User Guide

WebDocs™ iSeries Edition

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Document Version 3.00.1

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Chapter 1

Introduction

Introduction

This chapter provides basic information about the contents of this manual.

This chapter includes the following topics:

What's in This Book 2

About RJS Software Systems 3

What's Not in This Book 4

Document Conventions and Symbols 4

Contacting RJS Software Systems 5

What's in This Book

This User Guide provides detailed information on how to use WebDocs™ - iSeries Edition on your PC. This manual is intended for WebDocs end users.

For information about installing, configuring, setting up, and customizing WebDocs using the iSeries screens, refer to the WebDocs iSeries Administrators Guide.

Here is what's included in this book.

- **Chapter 1 Introduction** describes this User Guide, how to find the information you need, and how to contact RJS Software Systems.
- **Chapter 2 Overview of WebDocs** 8 describes the benefits of using WebDocs, how WebDocs works, and what is new with WebDocs as of Summer, 2007.
- **Chapter 3 Getting Started** 14 provides instructions on how to log in, understand WebDocs windows, how documents are uploaded, how to locate documents. It also includes a handy overview of all WebDocs functions.
- **Chapter 4 Finding Documents** 36 provides step-by-step instructions on using traditional searches, link searches, and full text searches to locate documents in WebDocs.
- **Chapter 5 Working with Documents** 56 provides step-by-step instructions on everything you might want to do to a document in WebDocs: view it, email it, add notes to it, update index information, delete it, etc. This chapter also includes information on using Custom Lookups and viewing the audit log.
- **Chapter 6 Working with Document Versions** 84 provides step-by-step instructions for checking out and checking back in different versions of a document.
- **Chapter 7 Working with Microsoft Office Add-Ins** 96 provides step-by-step instructions for working with Microsoft documents that are stored in WebDocs. This chapter includes how to open, close, upload, and check in and check out WebDocs documents from Microsoft Word or Excel, (and how to upload from Microsoft Outlook).
- **Chapter 8 Using Document Routing** 112 provides step-by-step instructions for working

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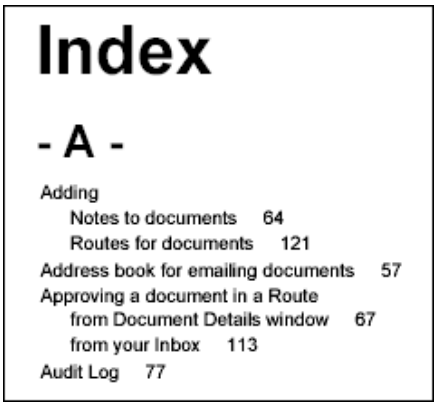
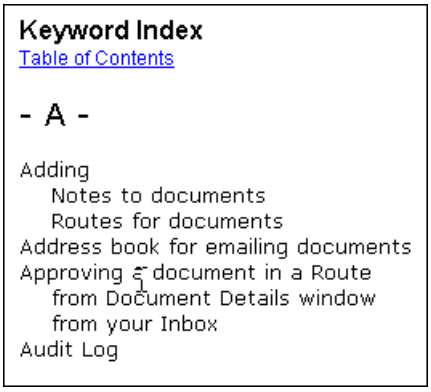
with documents that have been routed to your WebDocs Inbox. This chapter includes how to approve or reject documents, route a document, add an Inbox to a Routing Slip, and how to view Routing Slips for documents.

- **Index** 136

  The document Index is another way to find information in this manual. In the PDF manual, just like in a traditional book, the Index lists WebDocs topics and concepts in alphabetical order and presents the page number on which information about that topic or concept appears.



If you are using the HTML version of the manual, the Index topics appear in the Keyword Index in the left panel of the Help window. Click to toggle between the Table of Contents and the Keyword Index.



About RJS Software Systems

RJS Software Systems provides software and service solutions that allow organizations to access information when, where and how they need it, with superior customer service. Read more about us on the RJS web site.

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What's Not in This Book

This User Guide manual does not describe the following:

- Configuration and use of individual document input equipment (i.e., fax or scanner). Refer to the manufacturer instructions for help.
- How to use some of the Document Management optional components. These components are listed in the Products and Services section of the RJS web site.

  See the individual manuals for information on using these components. Manuals are in the Support section of the RJS web site.
- Use of individual web browsers.

Document Conventions and Symbols

The following document conventions are used throughout this reference manual:

- Titles of documents appear in Italics. Italic type is also used to indicate information that varies by circumstance.
- In step-by-step procedures, the following are bolded: selections in lists, buttons that you click, and keys that you press.
- Acceptable hardware server for WebDocs could be noted as AS/400, iSeries, or i5. For simplicity, all references to the server in this manual will default to the term iSeries unless the notation is specific to a specific server model.
- The document version, shown on the first page of this manual, denotes both the WebDocs software version this manual represents and document draft for the release. Document version will be in the format of X.YY.N. Where X.YY represents the WebDocs software version and N represents the document draft number. For example, if the document version is noted as 2.17.2 then the information in this manual is current as of WebDocs version 2.17 and is the second release of the manual for software version 2.17.
- RJS Software Systems offers two editions of the WebDocs software: "WebDocs - iSeries Edition" and "WebDocs - Windows Edition." For simplicity, most references to the software in this manual will default to "WebDocs."
- Typically, with WebDocs as with most software applications, there are several ways to accomplish the same thing. In this manual, we include one simple way to perform an action: usually by clicking.

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Contacting RJS Software Systems

Please review the following information before contacting RJS Software Systems for technical support.

Before You Contact RJS

If you have a question about a WebDocs operation, check both the Table of Contents and Index. We tried to anticipate your questions.

If you have a question or problem installing, configuring, setting up, or customizing WebDocs, refer to the WebDocs iSeries Administrators Guide before you contact us.

You may also want to ask your system administrator for help or check the RJS web site.

Contact Information

Telephone support is available on business days from 8:00 am to 5:00 pm Central Time.

888-757-7638 Sales/Support

952-736-5800 General

952-736-5801 Fax

Support is also available via email at support@rjssoftware.com.

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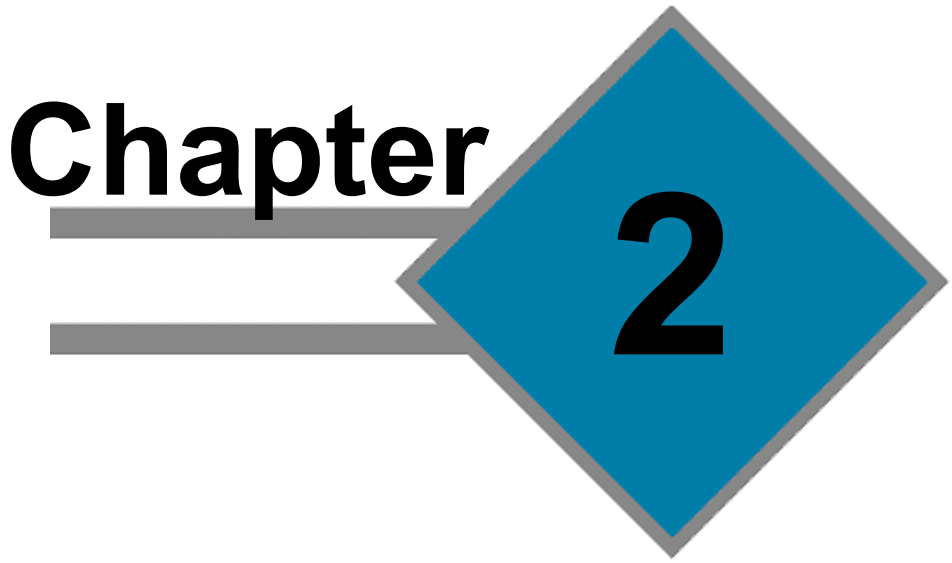

Overview of WebDocs

Overview of WebDocs

This chapter provides an overview of the product and how it can be used within your organization.

This chapter includes the following topics:

Introduction to WebDocs 8

Basic Document Flow using WebDocs 9

What's New in WebDocs 3.00 10

Introduction to WebDocs

WebDocs, formerly known as Image Server/400, is a web browser-based document image management system for the iSeries. Documents can be quickly scanned into the system (or uploaded manually or in batches). When documents are uploaded, they are assigned identifying information that can later be used to retrieve them.

Documents are located and retrieved for viewing via any web browser. Documents can be later archived to CD, optical disk, remote FTP sites, or any other available storage devices for long-term storage.

Highlights of WebDocs:

- Upload documents from any Twain, ISIS® or Kofax® compliant scanner or upload them manually or in batches.
- View documents from any web browser.
- Store documents in IFS folders, Windows NT/2000 network attached storage (NAS) servers, CDs, optical disk or a variety of alternative storage devices.
- Create unlimited number of Document Types. For example, Accounts Payable, Accounts Receivable, Orders, Patient Info, etc.
- Store an unlimited number of document formats including popular word processing files, spreadsheets, PDF, text, iSeries spool files, image files, audio files, video files, emails, faxes, etc.
- Assign up to 10 user-defined Search Keys for each document.
- Integrate with existing 5250 terminal ("green screen") or Windows applications for scanning or retrieval.
- Learn how to use WebDocs in minutes.

You can begin creating and accessing digital documents with WebDocs in less than one hour. These digital documents will allow you to maintain reliable and accurate business information that is easily located and accessed by personnel using a common web browser. You will have a centralized database of company information, regardless of information source or type. This common access improves productivity. You can retrieve necessary documents within seconds of your request without leaving your desk.

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Basic Document Flow using WebDocs

As you use WebDocs, you will find that the majority of your activity consists of four functions: uploading documents, identifying document index information, searching and retrieving documents, and viewing documents.

The diagram below summarizes these functions.

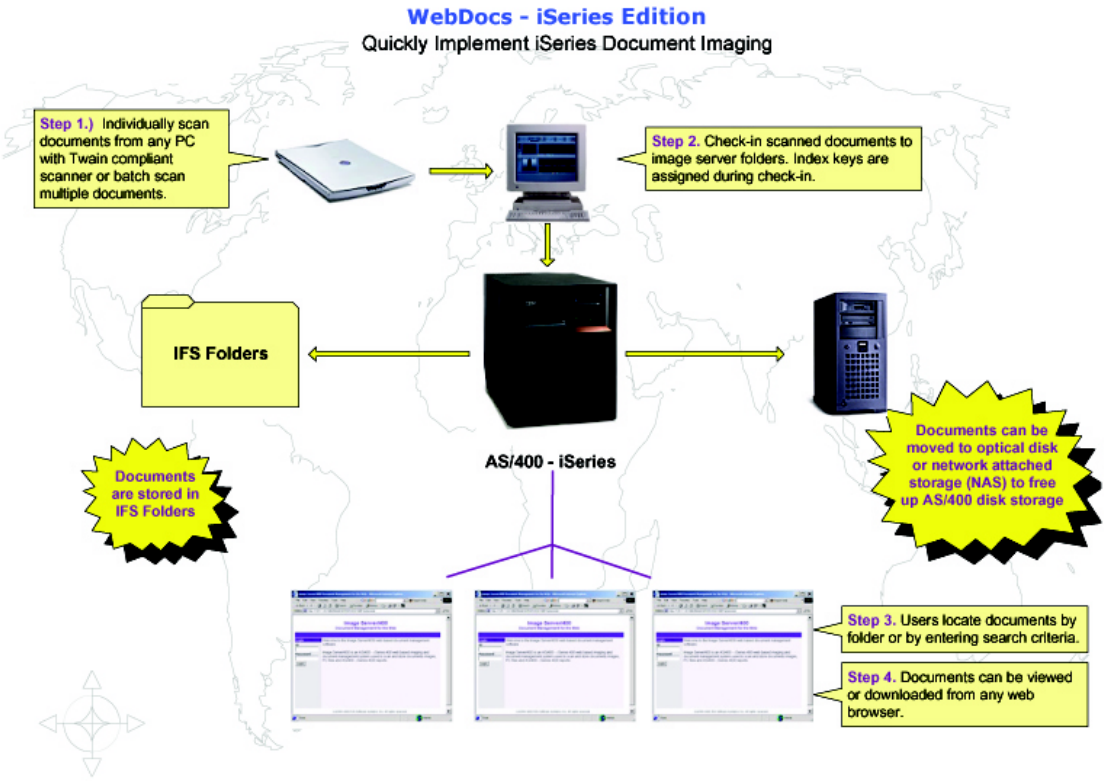
WebDocs - iSeries Edition
Quickly Implement iSeries Document Imaging
Step 1.) Individually scan documents from any PC with Twain compliant scanner or batch scan multiple documents.
Step 2. Check-in scanned documents to image server folders. Index keys are assigned during check-in.
IFS Folders
AS/400 - iSeries
Documents are stored in IFS Folders
Documents can be moved to optical disk or network attached storage (NAS) to free up AS/400 disk storage
Step 3. Users locate documents by folder or by entering search criteria.
Step 4. Documents can be viewed or downloaded from any web browser.

Figure 1 - WebDocs Document Flow

Document Upload

Inputting of documents is extremely flexible. Document sources include, but are not limited to, electronic documents currently stored on local PC's, faxes, emails, scanned documents, or iSeries spool files. Additional document sources such as digital cameras, electronic data interchange (EDI) or electronic forms output are included.

By default, documents are physically stored in the iSeries IFS system.

Entering Document Index Information

When documents are uploaded, they are assigned to a Folder and a Document Type. They are

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also assigned a Document Title, a Document Date, and Search Key values. System administrators can assign up to 10 Search Keys for each Document Type. The values entered for Search Keys, Document Title, Document Type, and Document Date identify that document.

Document Search

You can enter search criteria to locate needed documents. Document search criteria include searches based on Document Type, Document Date, Document Title and Search Key values. There are two other optional search functions. If your system administrator has set up Link Searches, you can also search using alternate search keys. If your system administrator has set up Full Text Searches, you can search for text strings. If you scanned documents using OCR, Full Text Search also searches the text in scanned images.

Document Viewing

Document viewing is as simple as selecting to view the document from a list of documents: either the results from a search or a list of documents in a Folder.

Documents are viewed with the application software associated with the document format: Microsoft Word for ".doc" files, Microsoft Excel for .xls files, Adobe Acrobat for PDF's, etc.

What's New in WebDocs 3.00

WebDocs 3.00 includes several new features designed to improve the power and flexibility of WebDocs. RJS Software is committed to listening to our customers and continually improving our products to meet and exceed their expectations.

If you have used earlier versions of WebDocs, look for these enhancements in version 3.00:

- Major changes to the security model at the request/suggestion of customers. Users can now be assigned to more than one Group (i.e., functional unit). This gives system administrators more flexibility in assigning security privileges to Users.
- System administrators can define a default Document Type and a default Folder for each User. These selections become the default choices wherever you can select a Document Type or a Folder from a drop-down list, for example on document upload and search windows, and within the RJS Imaging Scan Workstation.
- The WebDocs browser interface has been redesigned. The search functions are now above the Folder list. This makes it easier for you to work with these WebDocs functions, especially if your company has a lot of Folders. You no longer have to scroll to the bottom of that window to start a search.
- There can be five levels of Folders. Previous versions of WebDocs only supported three levels of Folders. This gives your system administrator the ability to create more complex folder structures, though we recommend using a minimum number of Folders.
- Your system administrator can customize how WebDocs looks and which server it runs from using our JSP interface.
- Packet Printing - This optional WebDocs module can be used to assemble and print or electronically deliver document packets such as shop packets, work orders, bills of lading,

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rendition billing, marketing packets, etc. This saves you time by automatically assembling and printing packets dynamically. Original documents can be generated as spool files, Microsoft Excel, Microsoft Word, or PDF files. Any combination of these Document Types can be assembled into a single composite packet for printing, emailing, or faxing.

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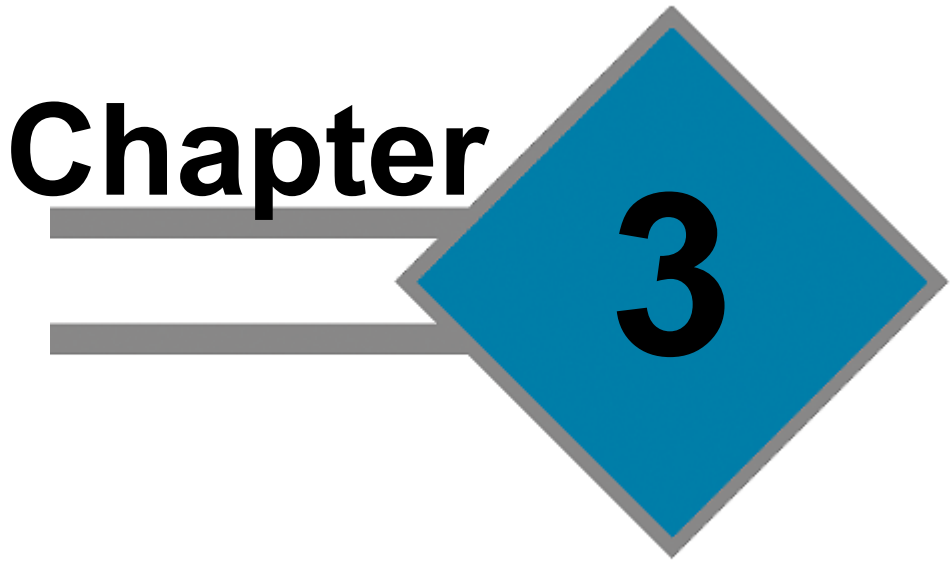

Getting Started

Getting Started

This chapter will help you start using WebDocs quickly. It provides basic instructions for the most common WebDocs tasks.

Detailed instructions for other WebDocs tasks are in other chapters in this manual.

This chapter includes the following topics:

Accessing and Logging in to WebDocs 14

Understanding WebDocs Windows 16

How Documents Get in WebDocs 18

Uploading Documents Manually 19

Scanning using RJS Imaging Scan Workstation 26

Locating Your Document 27

Overview of Working with Documents 30

What's Next after Getting Started? 33

Accessing and Logging in to WebDocs

Before accessing and logging in to WebDocs, make sure the system administrator has set up user access for you. You need a Username and password to log in.

Your system administrator will have set up security rights based on your Username. These security rights determine what you can do in WebDocs. Your Username may also be associated with a Group of users. You may inherit certain access privileges as a result of being part of a Group. If you cannot access a document or a feature that you need, contact your system administrator.

Accessing WebDocs

To access WebDocs from a web browser:

1. If you are not already logged in to your company's network, log in.

   Note: Most companies use WebDocs on their Intranet. If you need to access WebDocs over the Internet, notify your system administrator.

2. Start a web browser (Internet Explorer, Mozilla Firefox, Safari, etc.).

3. Enter the login URL that your system administrator has supplied. The URL will look like the examples below, but with a different IP address. (The IP address is the unique string of numbers that identifies a computer on the Internet.)

   `http://192.168.1.1/imageserver/doc100r?action=init`

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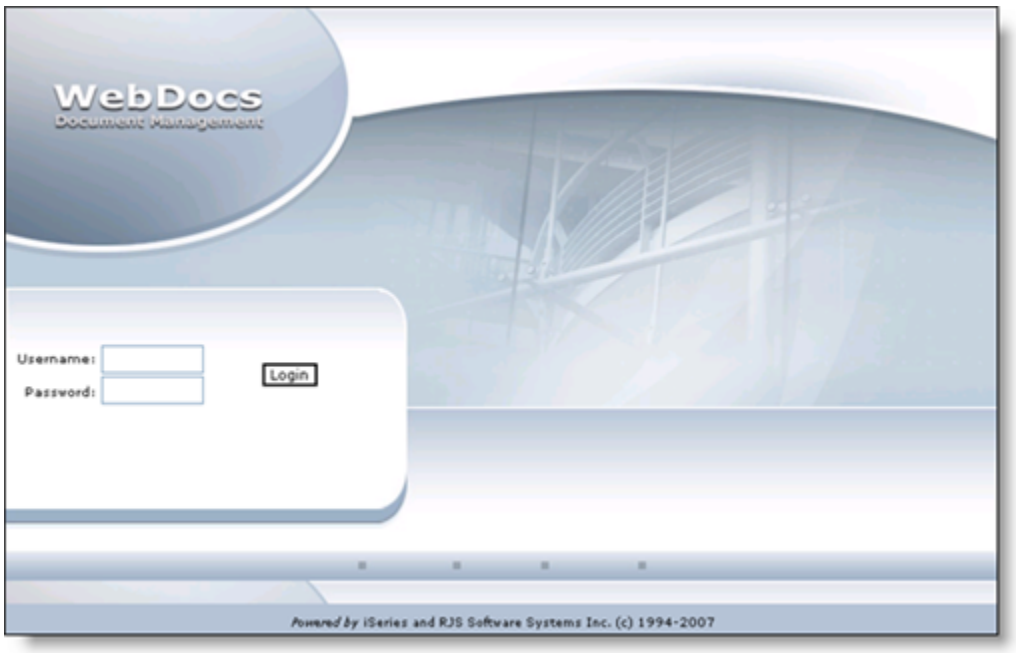
- or -

http://192.168.1.1:8888/imageserver/doc100r?action=init

After entering the WebDocs login URL, the WebDocs login window displays:



WebDocs Login Screen

Logging in to WebDocs

To log in to WebDocs:

1. Enter your Username and Password.

   Note: WebDocs Usernames and Passwords are case sensitive.

2. Click the **Login** button.

   The WebDocs main window displays. Refer to Understanding WebDocs Windows 16 for more information.

Logging out of WebDocs

To log out of WebDocs:

1. Click the Log out link on the left side of the window.

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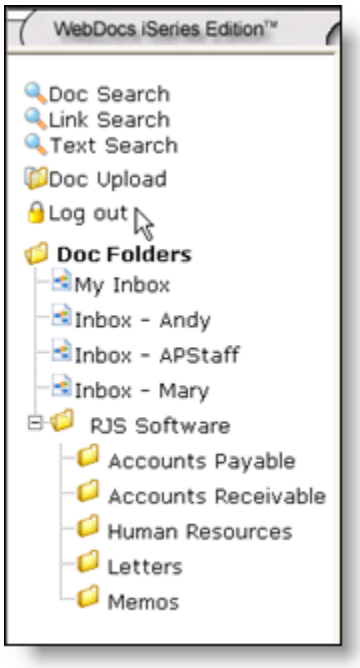

The login window displays again in case you want to log back in.

2. Either close the web browser or navigate to a different web site or application.

Understanding the WebDocs Browser Interface

WebDocs runs in a web browser window, so the interface will probably be immediately familiar to you. As with other Windows applications, navigate by clicking the mouse or by entering information via the keyboard.

The WebDocs window is divided into two parts: the left side and the right side.

- The left side is for navigation. Use the top portion of it to initiate searches, upload documents, and log out of WebDocs. Use the bottom portion of it to access your Document Routing Inbox (and any others you have access to) and to open or close Document Folders.

- The right side is for working with documents. This is where you select documents from lists, identify document index information, and perform many other functions.

  There are two main kinds of windows that display on the right side: List windows and Detail windows.

Note: Do not worry if some of the links or buttons pictured below do not display on your screen. Your company may not use all of the WebDocs features or you may not have security access to certain functions. The picture below is a sample of a User with full security rights for a company that uses all of the WebDocs features.

List Windows

List windows display sets of documents: usually the contents of a Folder or the results of a

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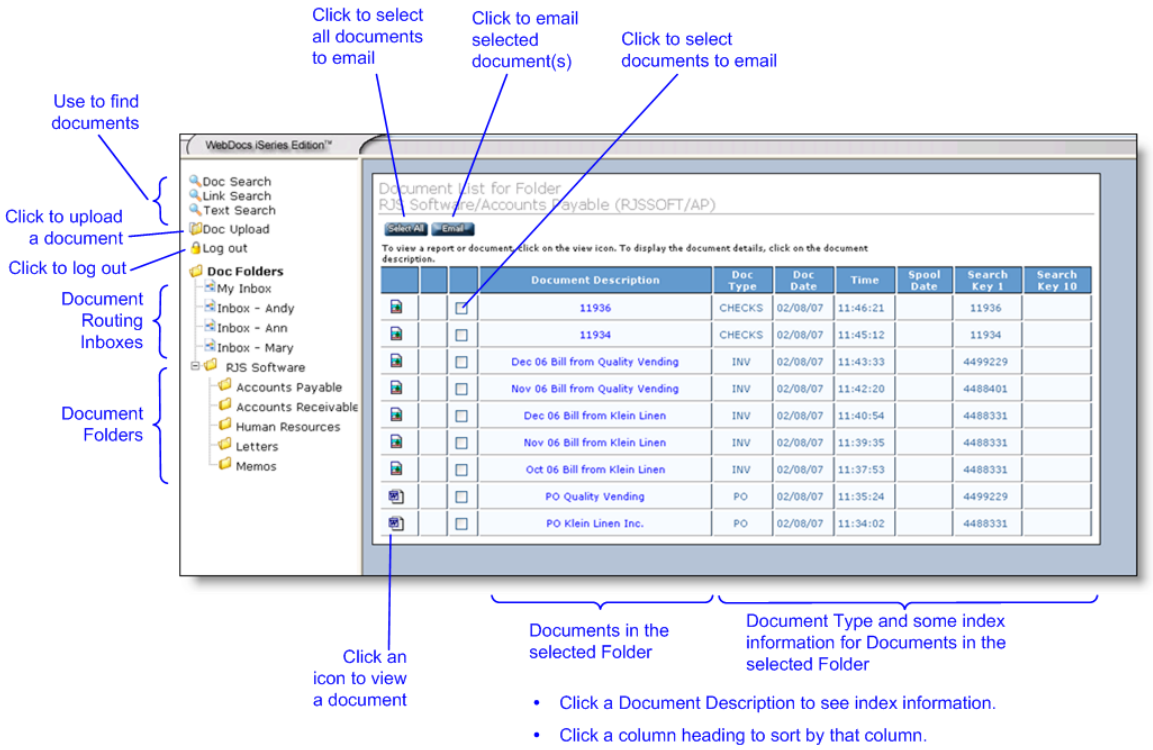
search. This is usually where you select one or more documents for further action.


Click to select all documents to email
Click to email selected document(s)
Click to select documents to email
Use to find documents
Click to upload a document
Click to log out
Document Routing Inboxes
Document Folders
WebDocs iSeries Edition™
Doc Search
Link Search
Text Search
Doc Upload
Log out
Doc Folders
My Inbox
Inbox - Andy
Inbox - Ann
Inbox - Mary
RJS Software
Accounts Payable
Accounts Receivable
Human Resources
Letters
Memos
Document List for Folder
RJS Software/Accounts Payable (RJSSOFT/AP)
Select All
Email
To view a report or document, click on the view icon. To display the document details, click on the document description.
Document Description
Doc Type
Doc Date
Time
Spool Date
Search Key 1
Search Key 10
11936 CHECKS 02/08/07 11:46:21 11936
11934 CHECKS 02/08/07 11:45:12 11934
Dec 06 Bill from Quality Vending INV 02/08/07 11:43:33 4499229
Nov 06 Bill from Quality Vending INV 02/08/07 11:42:20 4488401
Dec 06 Bill from Klein Linen INV 02/08/07 11:40:54 4488331
Nov 06 Bill from Klein Linen INV 02/08/07 11:39:35 4488331
Oct 06 Bill from Klein Linen INV 02/08/07 11:37:53 4488331
PO Quality Vending PO 02/08/07 11:35:24 4499229
PO Klein Linen Inc. PO 02/08/07 11:34:02 4488331
Click an icon to view a document
Documents in the selected Folder
Document Type and some index information for Documents in the selected Folder
• Click a Document Description to see index information.
• Click a column heading to sort by that column.

Detail Windows

Detail windows display information about a document. Detail windows are generally your starting point for working with a document: whether it be to view, route, research, or revise a document.

Note: If you are viewing this online, scroll all the way to the right to see the whole diagram below.

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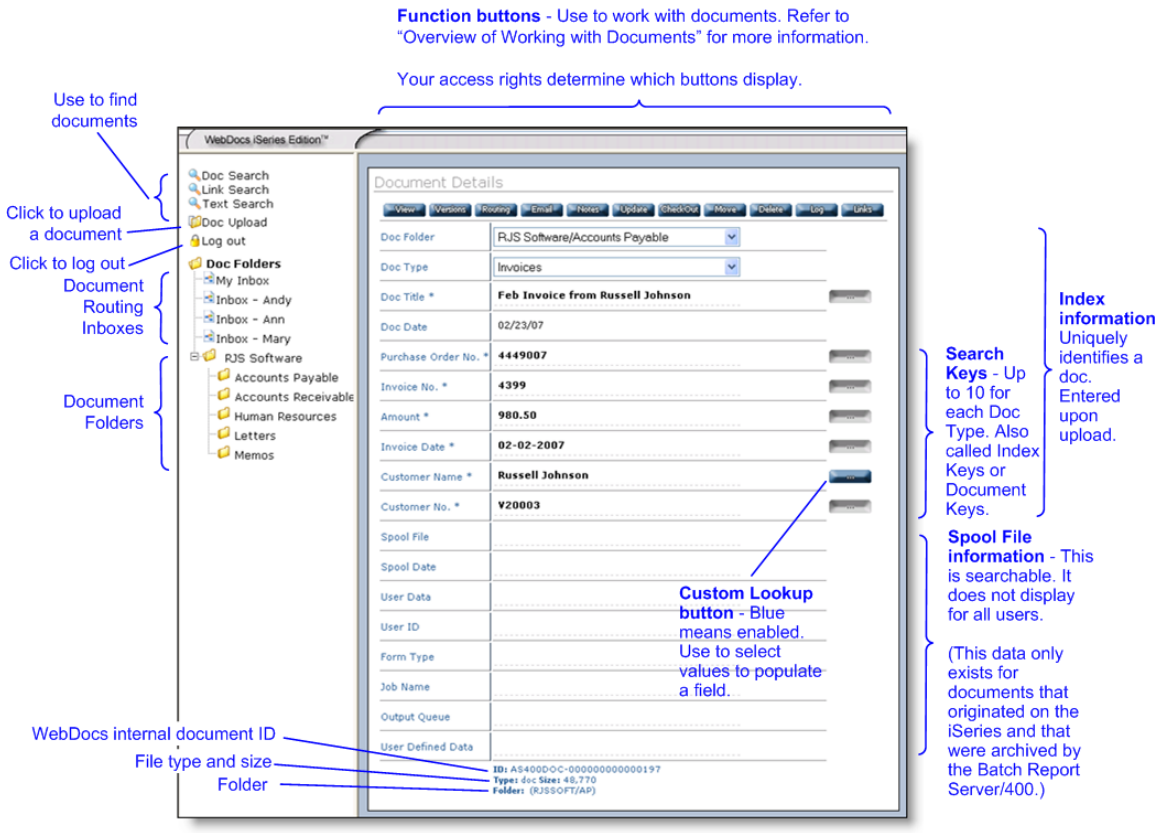

How Documents Get in WebDocs

Any type of document can be uploaded to WebDocs. WebDocs does not restrict file types. Document sources can be either digital (e.g., a Microsoft Word document or an Excel spreadsheet) or a paper document that has been converted to a digital format.

There are many ways that documents can be entered into WebDocs. This process of placing documents in WebDocs is referred to as "uploading," "capturing," or "checking in" documents.

Documents can be:

- Uploaded from the RJS Imaging Scan Workstation. For more information, refer to Scanning using RJS Imaging Scan Workstation 26 below and to the RJS Imaging Scan Workstation User Manual on the RJS Software Support Site.
- Scanned on any multi-function printer (MFP) that is configured correctly to save to a network directory from which they are uploaded to WebDocs via RJS Imaging Scan Workstation or RJS WebDocs Batch Import Utility.
- Uploaded from a directory via RJS WebDocs Batch Import Utility. (Documents may have been placed in a directory any number of ways.)
- Uploaded manually using the WebDocs interface from any location to which you have

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access (your hard drive, a network drive, a disk, or any other type of storage device). For more information, refer to Uploading Documents Manually 19.

- Uploaded manually from Microsoft Word, Microsoft Excel, or Microsoft Outlook if your company uses the RJS Microsoft Office Add-Ins.
- Uploaded automatically from an incoming fax or email (if your company has purchased this component).
- Uploaded via a program that has been created to upload documents automatically from another system. This requires custom programming.
- Uploaded from electronic forms.

Regardless of how documents were uploaded, specific information about each document is also stored. This information about the document is called the "Document Index Information." This information helps you and other WebDocs users locate documents later.

Uploading Documents Manually

To get started with your first document, upload a document manually. Remember, documents can be uploaded many different ways. For more information, refer to How Documents Get in WebDocs 18 and Scanning Using RJS Imaging Scan Workstation 26.

When you enter documents manually, keep in mind that the information you provide during upload is the information that will later identify documents in searches. Searches typically include Document Folders, Document Types, Document Titles, or Search Keys. You can update document information 69 later, but best practice is to enter it as accurately as possible the first time.

In this example, we are uploading a Word document from a hard drive. It is an invoice from a contractor. It looks like this:

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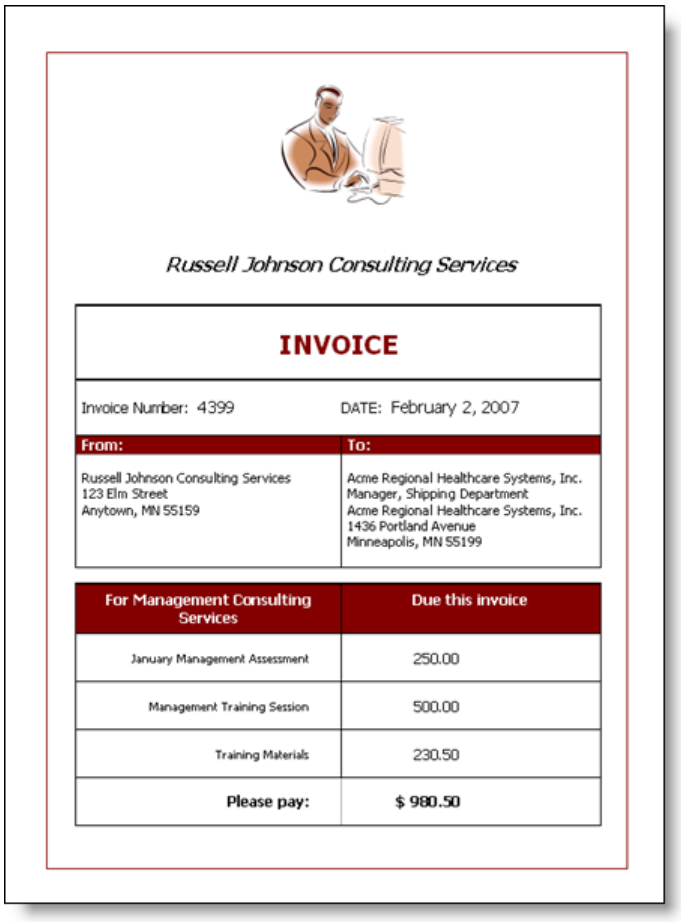

Russell Johnson Consulting Services

INVOICE

Invoice Number: 4399 DATE: February 2, 2007

From:	To:
Russell Johnson Consulting Services 123 Elm Street Anytown, MN 55159	Acme Regional Healthcare Systems, Inc. Manager, Shipping Department Acme Regional Healthcare Systems, Inc. 1436 Portland Avenue Minneapolis, MN 55199

For Management Consulting Services	Due this invoice
January Management Assessment	250.00
Management Training Session	500.00
Training Materials	230.50
Please pay:	**$ 980.50**

The Word document we are uploading

The upload process is the same regardless of what kind of document (Word, Excel, PDF, .JPG, etc.) is being captured.

To upload a document:

1. From the initial WebDocs window, click **Doc Upload**.

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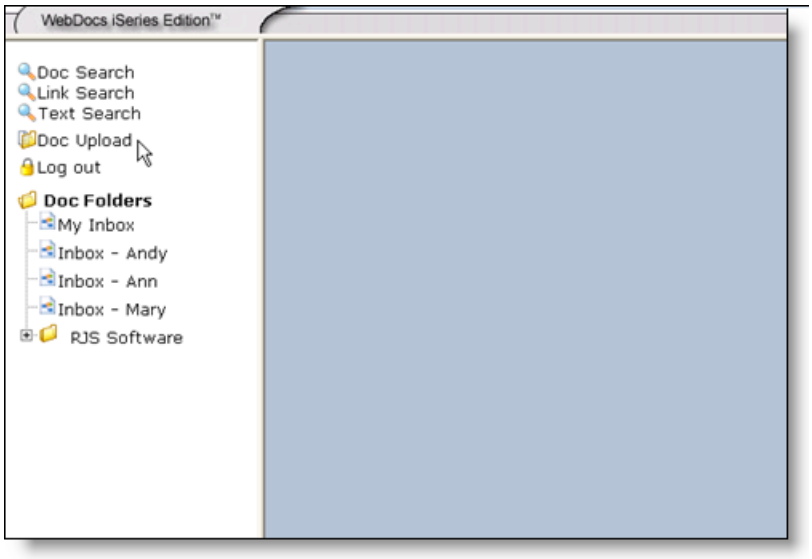

Initial WebDocs Screen

The "Document Upload" window displays.

Document Upload window

2. Click the **Browse** button and then identify a file for uploading.

   You can upload a file from your computer or from anywhere on your network. WebDocs can accept any PC file type including scanned images, PDF documents, Word documents, Excel documents, etc.

Uploading a document from "My Documents"

3. After identifying the file, click the **Upload** button to upload the file.

   The file uploads to WebDocs and the "Document Upload Check-In" window displays. This is where you enter index information about the document.

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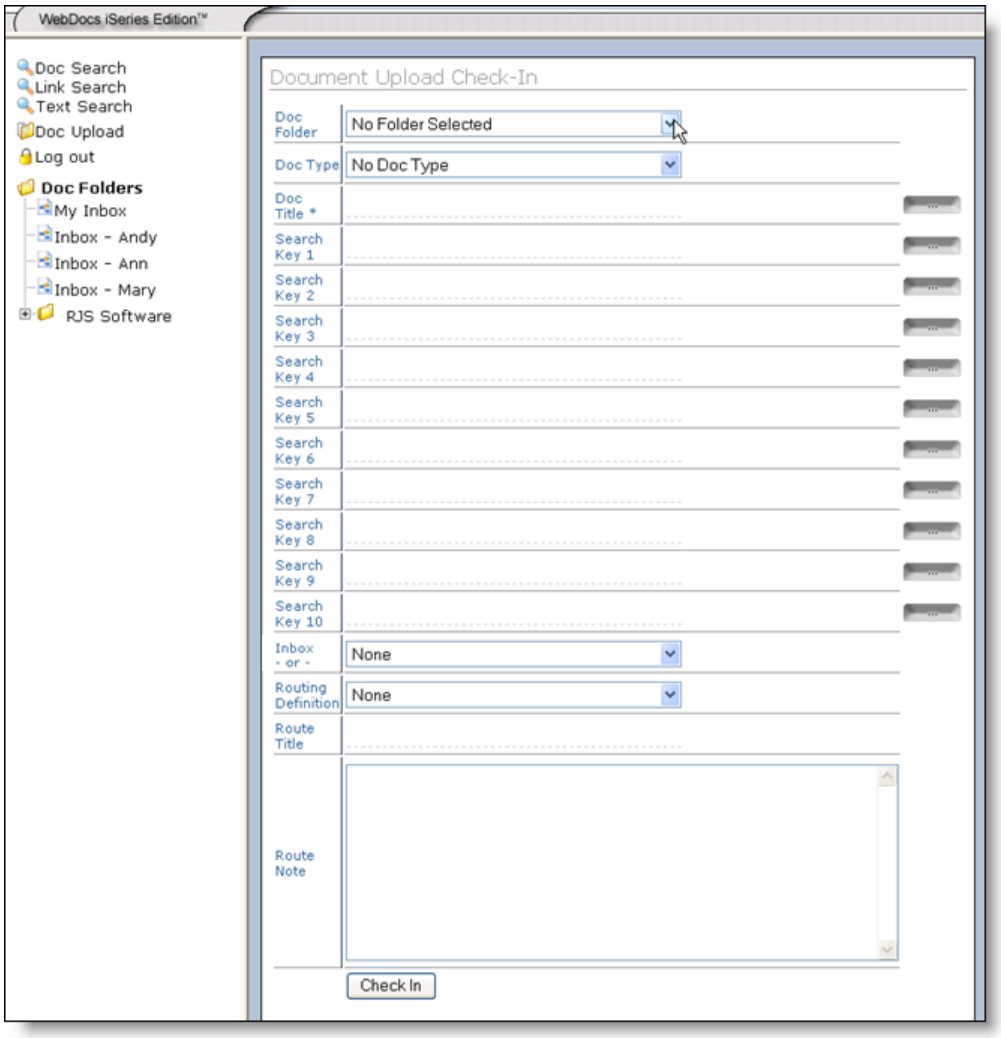
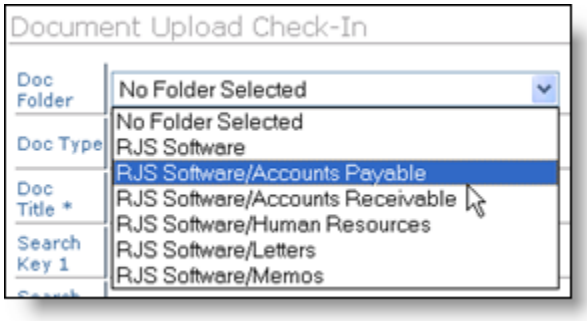


Document Upload Check-In window

4. Click the **Doc Folder** drop-down list and select a Document Folder.

   In this example, we will select the **RJS Software/Accounts Payable** folder.



5. Click the **Doc Type** drop-down list and select a Document Type.

   After you select the Document Type, the window is refreshed and the Search Keys that have been assigned to that Document Type display.

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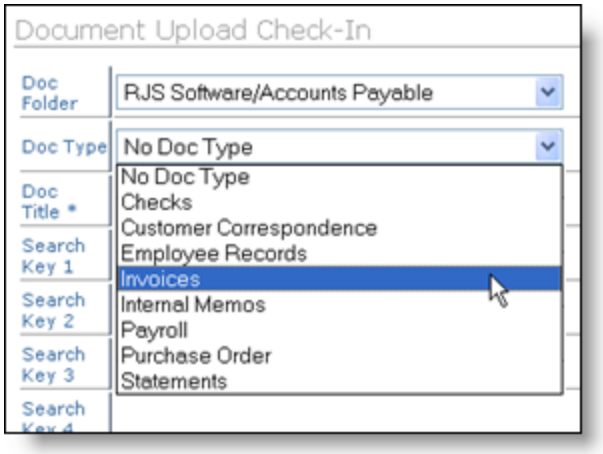
Your system administrator will have defined Document Types for your company. The system administrator will also have defined Search Keys for each Document Type. Document Types typically refer to a kind of document (invoice, check, memo, etc.) or to a group of similar documents (for example, Accounts Payable, Accounts Receivable, Payroll, HR, etc.).

In this example, we will select the Document Type **Invoices**. The Search Keys assigned to Invoices are: Purchase Order No., Invoice No., Amount, Invoice Date, etc.



6. Enter a document title in the Doc Title field. This is the name by which the document will be stored in WebDocs. This does not have to be the exact same as the filename that you are uploading. It does not have to be unique within WebDocs. If there is a drop-down list, select the title instead of entering it.

   Your system administrator may have set up a drop-down list from which you can select a Document Title from a predefined list.

   Document Title is required.

   In this example, we will enter ***Invoice from Russell Johnson*** in the Doc Title field.

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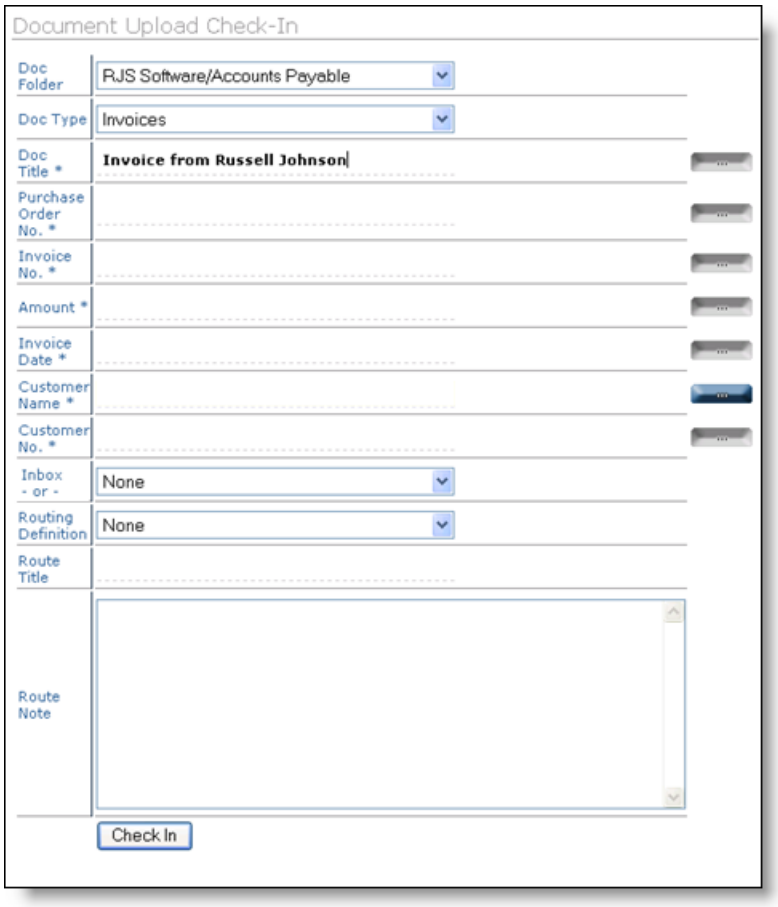

Document Upload Check-In screen

Note: If the **Custom Lookup** button next to the Doc Title field is enabled (i.e., it is blue not grey), click and select a value from the Custom Lookup popup. Refer to Using Custom Lookups 72 for more information.

7. Enter Search Keys in all required fields. An asterisk in the Search Key field title means that it is a required field. If there is a drop-down list, select rather than enter the Search Key information.

   You can enter more than one value in a Search field. Use a semi-colon (;) as a delimiter.

   Note: Remember, what you enter will later help identify this document in searches.

   In this example, we entered the following Search Keys.

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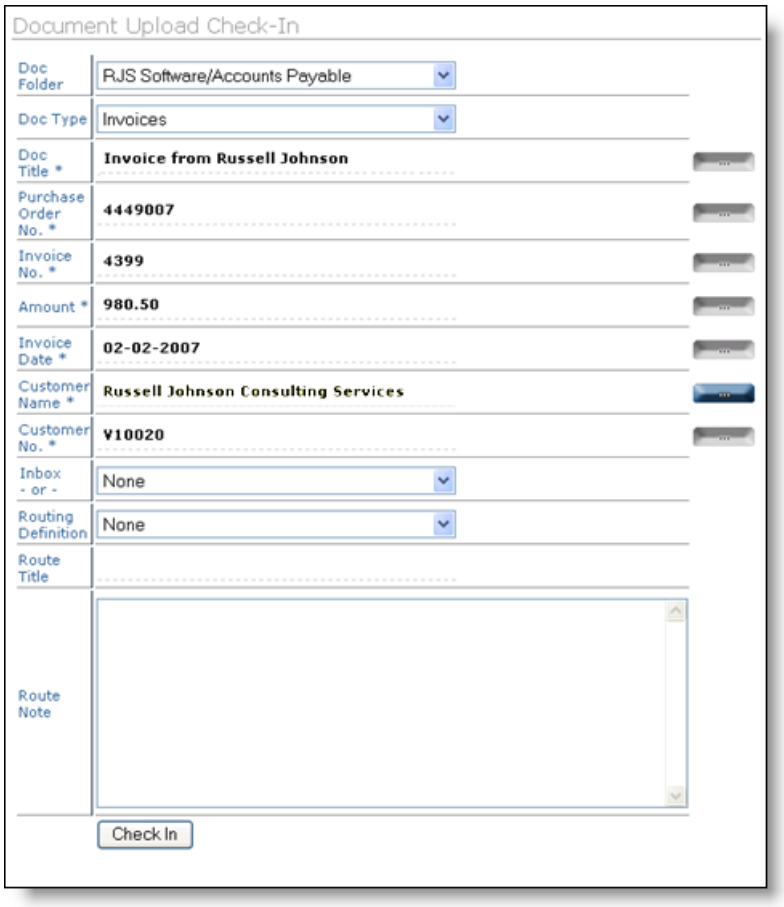

Search Keys entered

For now, we will not use the four Document Routing fields at the bottom of the window: Inbox, Routing Definition, Route Title, and Route Note. Refer to Routing Documents for information on this feature.

8. Click the **Check In** button to upload the document into WebDocs.

   The window is refreshed and the information you just entered is displayed in a Document Details window.

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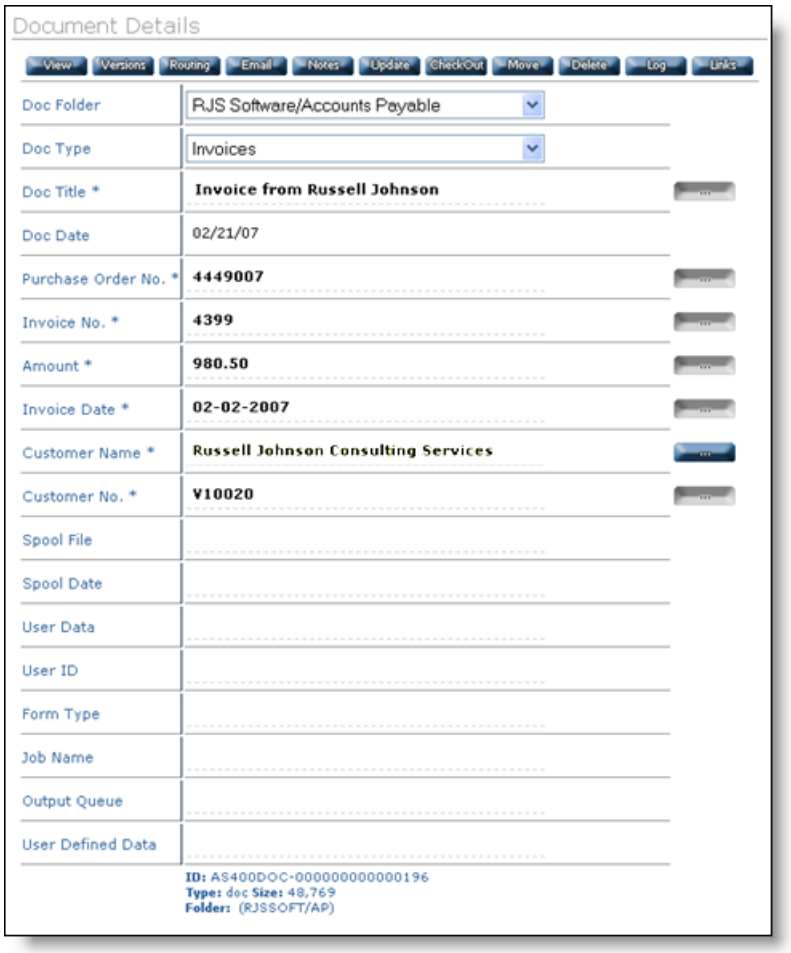

Congratulations! You have just uploaded your first document using the WebDocs document management software.

Once a document has been uploaded to WebDocs, it is available immediately. The document can now be viewed, checked out and checked back in, moved, emailed, etc. It will also be returned in searches when it matches the search criteria.

Scanning using RJS Imaging Scan Workstation

Imaging Scan Workstation is a utility that you can use to create digital copies of any paper documents you want stored within WebDocs. Documents can be scanned from any PC that has the Imaging Scan Workstation software installed. Scanning sessions can be for individual documents or for batches of documents.

When documents are scanned and checked in, document index information (the Doc Folder, Doc Type, Doc Title, the Doc Date, and the Search Keys) is also uploaded.

Document index information can be:

- Keyed manually
- Entered automatically based on reading OCR information or bar codes.

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- Entered automatically from custom database lookups.
- Passed using the iSeries Office Integrator.

Note: You can also scan documents using any multi-function printer (MFP) that is configured correctly. Documents can be scanned and then saved to a directory from which they can then be uploaded to WebDocs via the RJS Imaging Scan Workstation or the RJS WebDocs Batch Import Utility.

For more information, refer to the RJS Imaging Scan Workstation manual.

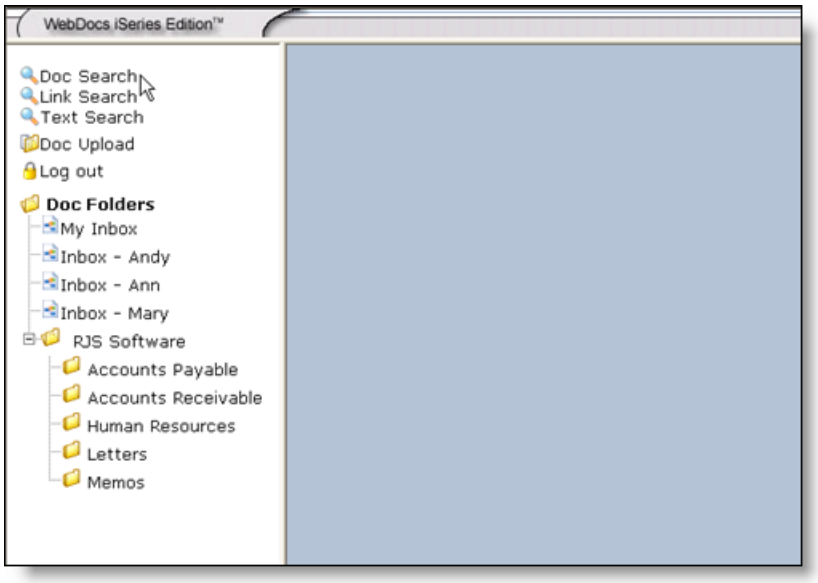
Locating Your Document

One of the benefits of WebDocs is the ability to quickly search all stored documents based on the index information that was entered when the document was originally uploaded. You can enter search criteria in one or more fields, and then WebDocs will return a list of documents that match your search criteria.

There are actually three ways to search. The most simple method is to do a Document Search. This topic guides you through a simple search. For information on the other two searching methods, refer to the topics in the chapter Finding Documents 36.

To find a document using Document Search:

1. From the main WebDocs window, click **Doc Search**.



Click Doc Search to find documents

The "Document Search" window displays.

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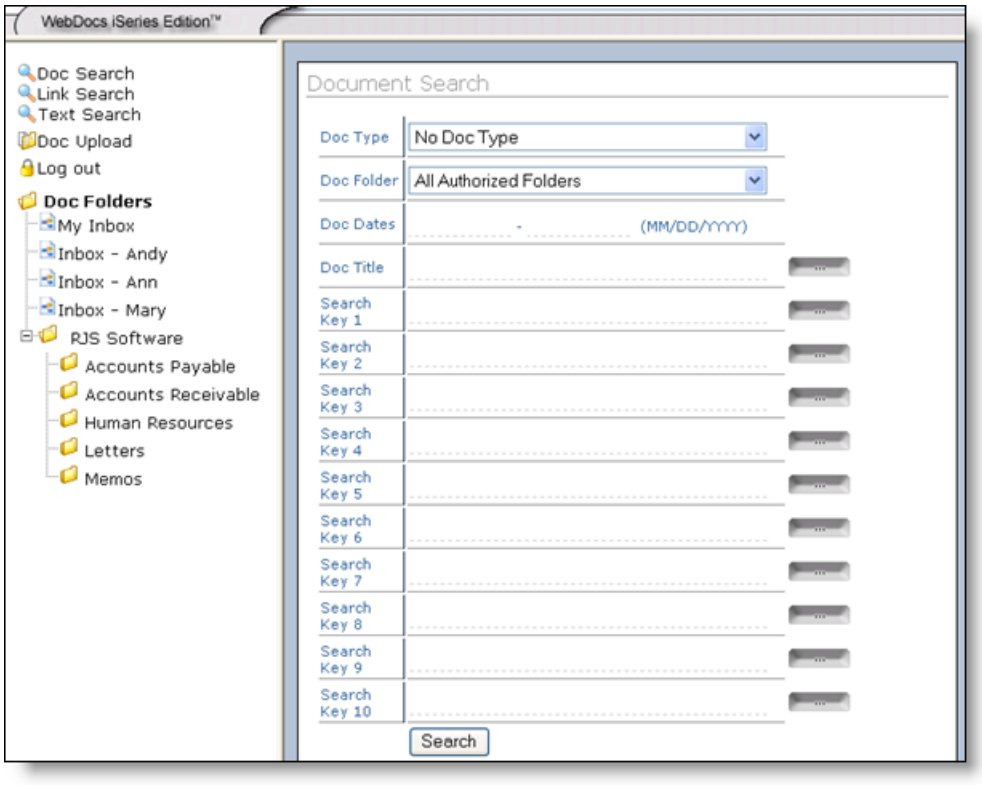

The Document Search window

In this example, we will search for the document we uploaded manually in the previous topic. Refer to Uploading Documents Manually 19 for information about that document.

2. Click the Document Type drop-down list and select **Invoices**. The window refreshes and the Search Keys associated with Invoices display.

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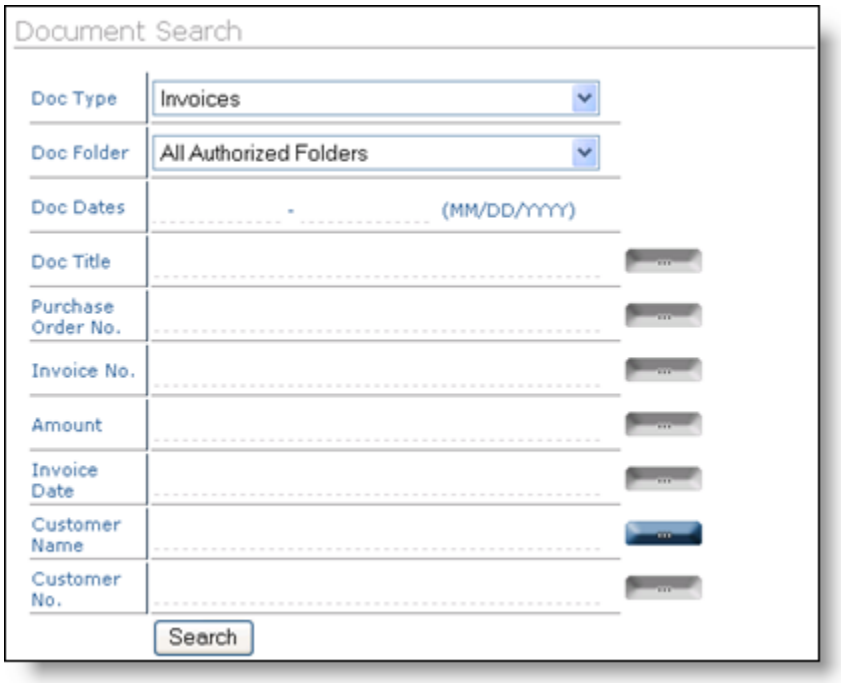

The Document Keys for the Document Type Invoice display

3. Enter one or more search criteria. The more criteria you enter, the narrower your search will be.

   In this example, assume that we can remember that the invoice was from Russell Johnson, but we cannot quite remember what the document title was.

   Enter ****Russell Johnson**** in the Document Title field. The asterisks are wildcards. Using them tells WebDocs to search for the character string "Russell Johnson" anywhere in the Document Title.

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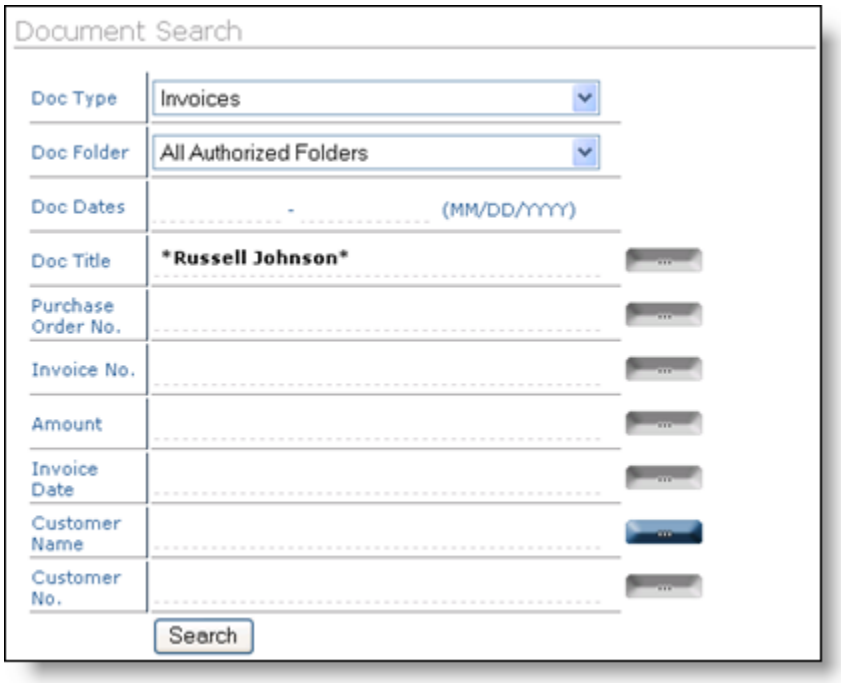
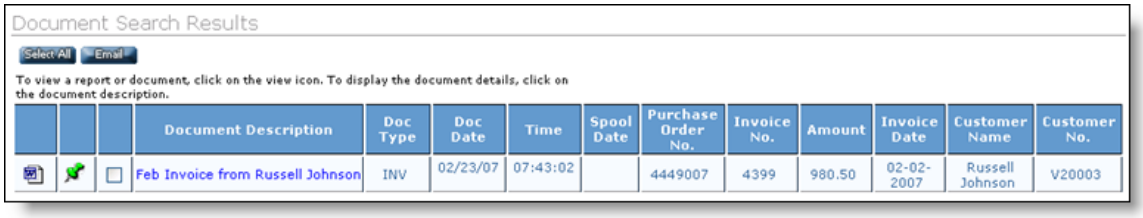


Enter search criteria in one or more document index fields

4. Click the **Search** button.

   After the search completes, the Document Search Results window displays a list of all available documents matching the search criteria. In this example, there was just one match.



One document met the search criteria

5. Click the **Document Icon** to view the document immediately or click the Document Description **Feb Invoice from Russell Johnson** to view the document index information and then maybe work with the actual document.

For a summary of what you can do with documents, refer to the next topic Overview of Working with Documents 30.

For step-by-step instructions on various WebDocs functions, see the topics in the chapter Working with Documents 56.

Overview of Working with Documents

The Document Details window displays when you click on the Document Description for a document from a List screen.

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The picture below illustrates what each button on the Document Details window is for. Following the picture is a brief description of each function with links to topics with step-by-step instructions for working with that function.

Note: Depending on how your system is set up and your access rights, you may not see all the buttons. Contact your system administrator if you want to discuss changing your access rights.

If you are not familiar with WebDocs screens, refer to Understanding WebDocs Windows 16.

Viewing a Document

To view the most recent version of the document, click the **View** button. The document will be opened in the associated application for the Document Type. For more information, refer to Viewing Documents 56.

Viewing Document Versions

WebDocs stores older versions of documents that have been marked via the check out/check in

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method. To display a list of all versions of a document in WebDocs, click the **Versions** button. You can see a history of the document and view a particular version. For more information, refer to Viewing Previous Versions of Documents 92.

Routing Documents

If your company uses the Document Routing feature, click the **Routing** button to see if a document is currently being routed or to route a document to an individual Inbox or to a predefined list of Inboxes. For more information, refer to the chapter Using Document Routing 112.

Emailing a Document

Click the **Email** button to email a document directly from WebDocs. For more information, refer to Emailing Documents 59.

Notes for a Document

To view or add Notes for a document, click the **Notes** button. Information in Notes typically help other users understand changes to a document or other situations relative to the document. For more information, refer to Adding Notes to Documents 66.

Updating Document Index Information

To update document index information (including Search Keys), modify the values and click the **Update** button. For more information, refer to Updating Document Index Information 69.

Checking Out a Document

Click the **Check Out** button to check a document out of WebDocs and possibly modify the document, all the while preventing other users from modifying the same document. Like a book in a library, only one user can check out a document at a time. For more information, refer to Checking Out, Revising, and Checking In Documents 84.

Moving a Document to Another Folder

Click the **Move** button to identify a different Folder for a document. For more information, refer to Moving Documents Between Folders 76.

Deleting Documents

Click the **Delete** button to remove the document from the current Folder. Deleted documents are placed in a Folder called "Deleted Documents." Users with administrative privileges can access deleted documents until they are deleted from the Deleted Documents Folder. For more information, refer to Deleting Documents 78.

Viewing Links for Link Search

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If your company is using the WebDocs Link Search feature, click the **Links** button to view or add Links. For more information, refer to Adding Links Manually 44 and Using Link Search 47.

Viewing the Audit Log

If your company is collecting audit information about documents, click the **Log** button to view the Audit Log. For more information, refer to Viewing the Audit Log 79.

What's Next after Getting Started?

You should now understand the basics of using WebDocs.

The remaining chapters provide deeper explanations of WebDocs features and instructions for using these features. Each chapter contains topics with step-by-step examples for using one or more WebDocs features.

We encourage you to work through the remaining topics in this manual, or to use the Table of Contents or the Index to locate a specific topic of interest to you.

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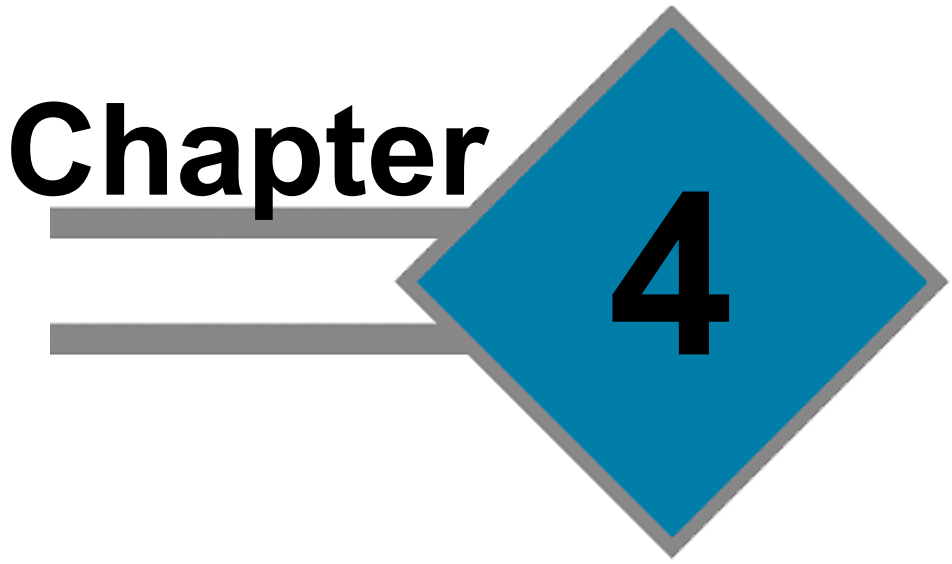

Finding Documents

Finding Documents

Most WebDocs systems hold hundreds of thousands of documents. Volumes may even exceed millions of documents. You and other WebDocs users may need to access a document at any time to view it, analyze it, update it, etc. WebDocs makes it easy for you to locate one or more documents within a large collection. You will probably become increasingly adept at finding documents as you gain experience with WebDocs.

There are three ways to search for documents in WebDocs. Remember, regardless of which method you use, your searches will only display documents that you have access rights to see.

The three search methods are:

- **Document Search** is the default WebDocs search feature. It is installed with WebDocs. Use Document Search to find documents using the document index information: the Document Folder, the Document Type, the Document Title, Document Date, or any of the Search Keys.

  Using Document Search requires no additional WebDocs setup.

  Note: If your company uses the RJS Software Microsoft Office Add-Ins component, you can also do Document Searches from Microsoft Word or Microsoft Excel in conjunction with opening documents. For more information, refer to Opening and Checking Out Documents from Word or Excel 102.

- **Link Search** provides an alternate way to search for documents. With Link Search, WebDocs searches alternate sets of index values. The Link Search keys are customized to hold values that show how documents are associated with other documents at your company. This means that you can find sets of related documents, not necessarily documents that only have matching Search Keys.

  For example, if you work in the Accounts Receivable department of a large company, you might have an Invoice and a Check Document Type. The Invoice number may not appear in the index fields for the checks, but it may be stored as a Link Search key for checks. If you did a Link Search on the Invoice number, the search would return the original Invoice along with all documents associated (i.e., "linked") with that Invoice.

  Your system administrator must set up Link Search before you can use it.

- **Full Text Search** is another alternate way to search for documents. With Full Text Search, WebDocs searches through the full text database that is created automatically when .TIF and . PDF files are scanned using Optical Character Recognition (OCR). Full Text Search also searches for character strings in Word, Excel, and PowerPoint documents.

  Your system administrator must set up Full Text Search before you can use it.

This chapter includes the following topics:

Using Document Search 37

Adding Links Manually 44

Using Link Search 47

Understanding Multiple Links 49

Using Full Text Search 51

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Using Document Search

You can use Document Search to search for documents based on the fields that were entered when the document was uploaded. You may want to do this to find a particular document, or just to see how many documents match certain criteria.

When you use Document Search, WebDocs searches through Folders and Document Types to which you have access rights. It will not return documents that are in Folders or that are of a Document Type to which you do not have access rights.

For a comparison of Document Search, Link Search, and Full Text Search, refer to the introduction to this chapter Finding Documents 36.

This topic includes instructions for entering searches and then some Document Search examples 40.

Entering search criteria using Document Search

To use Document Search:

1. From the WebDocs main window, click **Doc Search**.

   The Document Search window displays showing the search criteria you can enter.

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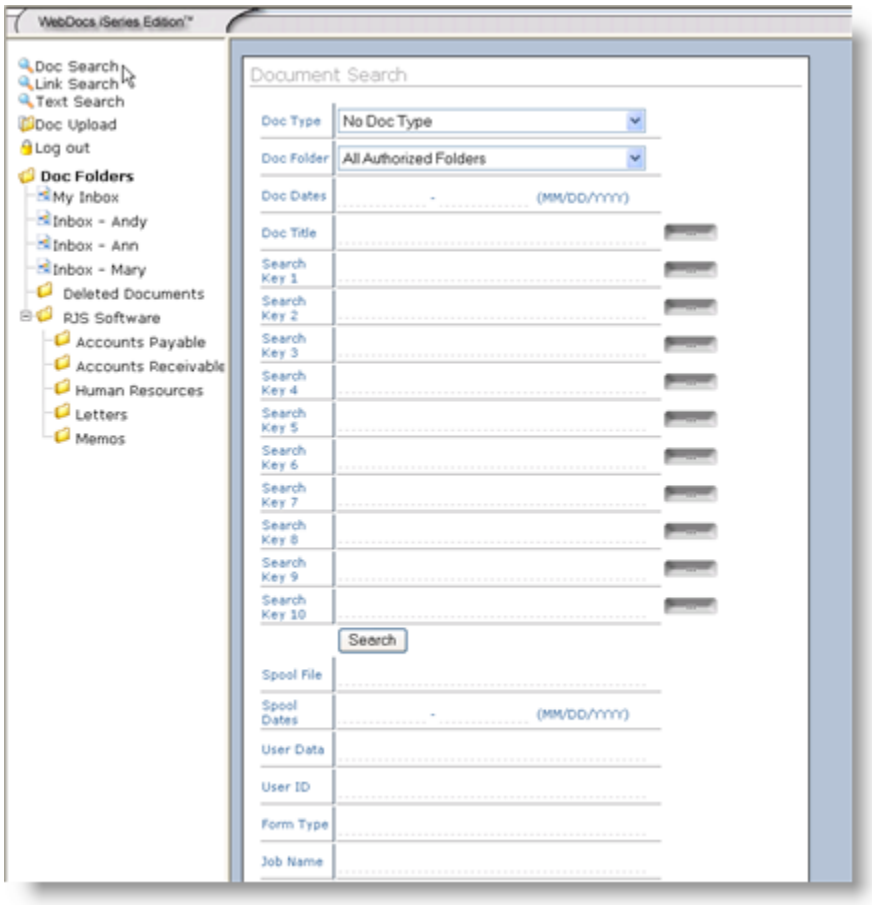

Enter your search criteria on the Document Search window

Note: Your system administrator determines whether Spool File data displays under the Search Keys. If they do, you can search the Spool File fields. These fields display data for documents for which this information is available. Typically, these are documents that originated on the iSeries and were archived by the Batch Report Server/400.

2. Enter at least one search field. The more criteria you enter, the more focused the search will be.

   Select or enter:

   - A Document Type from the Doc Type drop-down list. When you do this, the Search Key descriptions for that Document Type display.

     To search all Document Types, select **All Doc Types**. No Search Key descriptions display when All Doc Types is selected.

   - A Document Folder from the Doc Folder drop-down list. This limits the search to the Document Folder you select.

     To search all Folders, select **All Authorized Folders**..

   - A date or a range of dates in the Doc Dates field. Enter dates in the format MM/DD/YYYY. This is the date the document was originally uploaded to WebDocs.

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- Part or all of a Document Title in the Doc Title field.

  Use an asterisk (*) or the percentage sign (%) as an wildcard character. Use an underscore (_) or a question mark (?) as a wildcard character that limits the search to a single character. Refer to the Wildcard Search Example 43 below for more information on wildcards.

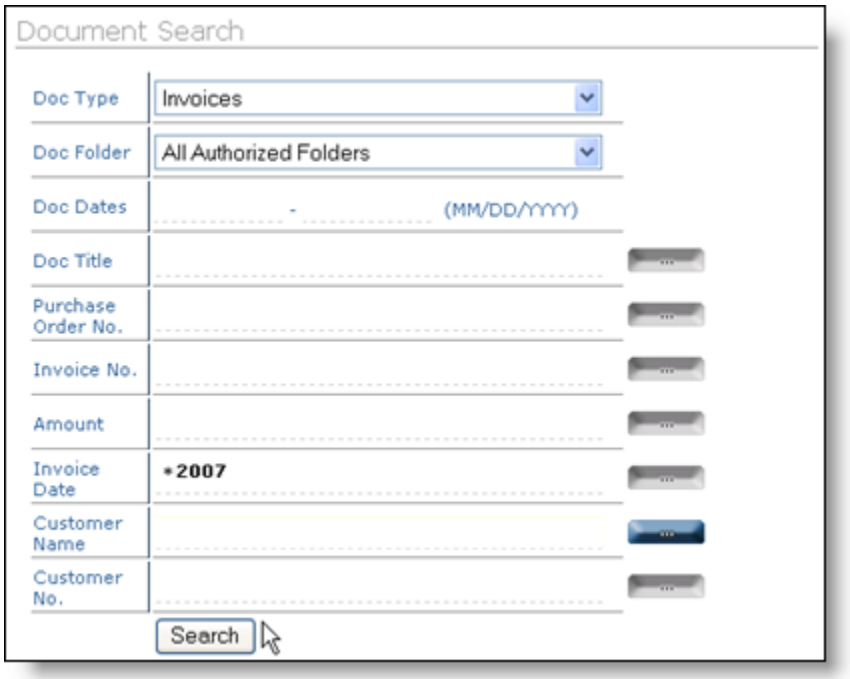
  If the Custom Lookup button next to the field is enabled (i.e., it is blue not grey), click and select a value from the Custom Lookup popup. Refer to Using Custom Lookups 72 for more information.

- Spool File data attributes. These fields display if your system administrator has set them up to display. The fields are populated for documents that originated on the iSeries and were archived by the Batch Report Server/400. You can search on the data in those fields.

3. If you select a Document Type, you can also specify search criteria based on the Search Keys for that Document Type.

   In this example, we selected the Document Type of "Invoices," so the Search Keys defined for Invoices display. For Invoices, you now know you can search on the Purchase Order Number, the Invoice Number, the Amount, the Invoice Date, the Customer Name, and the Customer Number. You can click the Custom Lookup button next to the Customer Number to select a value from the popup window if active.

   In this example, we entered search criteria to find documents with Invoice Dates in the year 2007.



When the Document Type "Invoices" is selected, the Search Keys for Invoices display

4. When you have entered all search criteria in the Document Search window, click the **Search** button at the bottom of the window.

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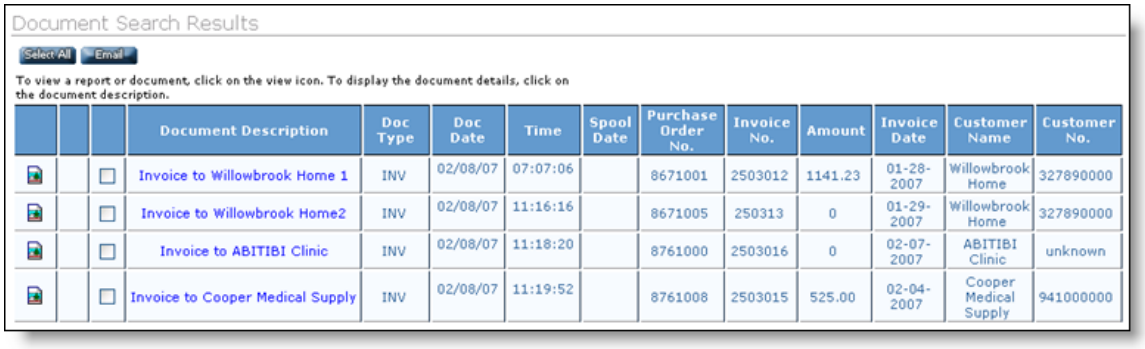
The "Document Search Results" window displays all the documents that match your search criteria. Click on any column heading to sort by that column.



Document Search Results

Select All | Email

To view a report or document, click on the view icon. To display the document details, click on the document description.

			Document Description	Doc Type	Doc Date	Time	Spool Date	Purchase Order No.	Invoice No.	Amount	Invoice Date	Customer Name	Customer No.
		☐	Invoice to Willowbrook Home 1	INV	02/08/07	07:07:06		8671001	2503012	1141.23	01-28-2007	Willowbrook Home	327890000
		☐	Invoice to Willowbrook Home2	INV	02/08/07	11:16:16		8671005	250313	0	01-29-2007	Willowbrook Home	327890000
		☐	Invoice to ABITIBI Clinic	INV	02/08/07	11:18:20		8761000	2503016	0	02-07-2007	ABITIBI Clinic	unknown
		☐	Invoice to Cooper Medical Supply	INV	02/08/07	11:19:52		8761008	2503015	525.00	02-04-2007	Cooper Medical Supply	941000000

Results for Document Search for Invoices dated 2007

If you are not satisfied with the search results (perhaps the search returned no documents or it returned too many documents to be useful), click the browser's **Back** button and modify your search criteria.

Note: Each time you search, WebDocs searches the entire collection of documents in WebDocs. It does not just search within the results from a previous search.

To work with any of the found documents:

- Click the Document Icon on the far left of each row to view the actual document.
- Click the Document Description to view the document index information for the document.

Document Search Examples

There are, of course, an infinite number of ways you could search for documents in WebDocs. What you can search depends on how the system administrator at your company set up Document Types, Document Folders, and Search Keys. The success of your searches also depends on the accuracy and completeness of the document index information in your system.

Here are some examples based on a set of documents that were uploaded for a fictitious company.

- To search for Invoices with Document Dates of 2007 and the name "Willowbrook" in the Document Title, fill in the window like this:

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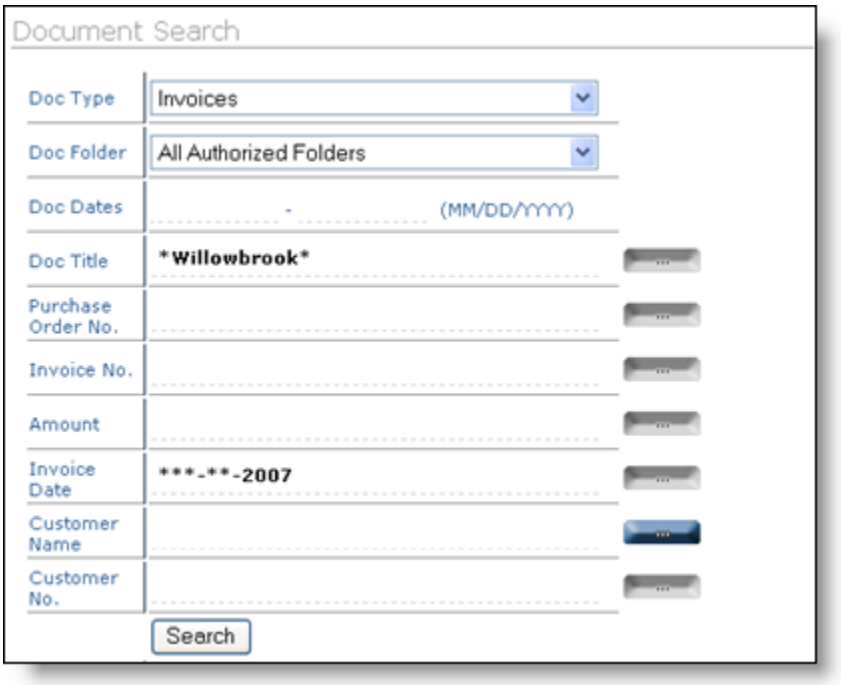
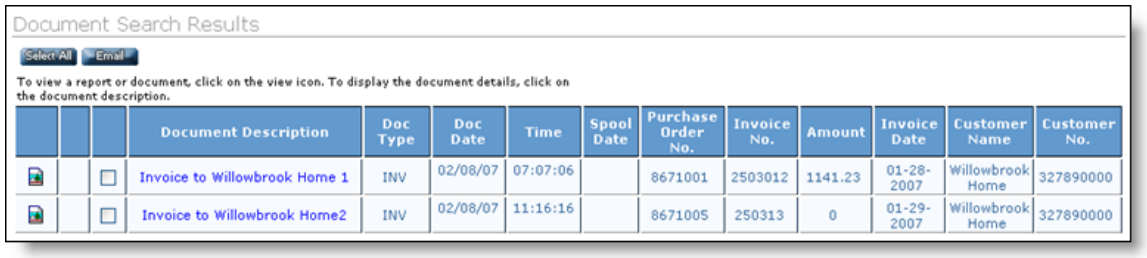


WebDocs returns these search results:



- To search all Folders and Document Types for "Willowbrook" in the Document Title, fill in the window like this:

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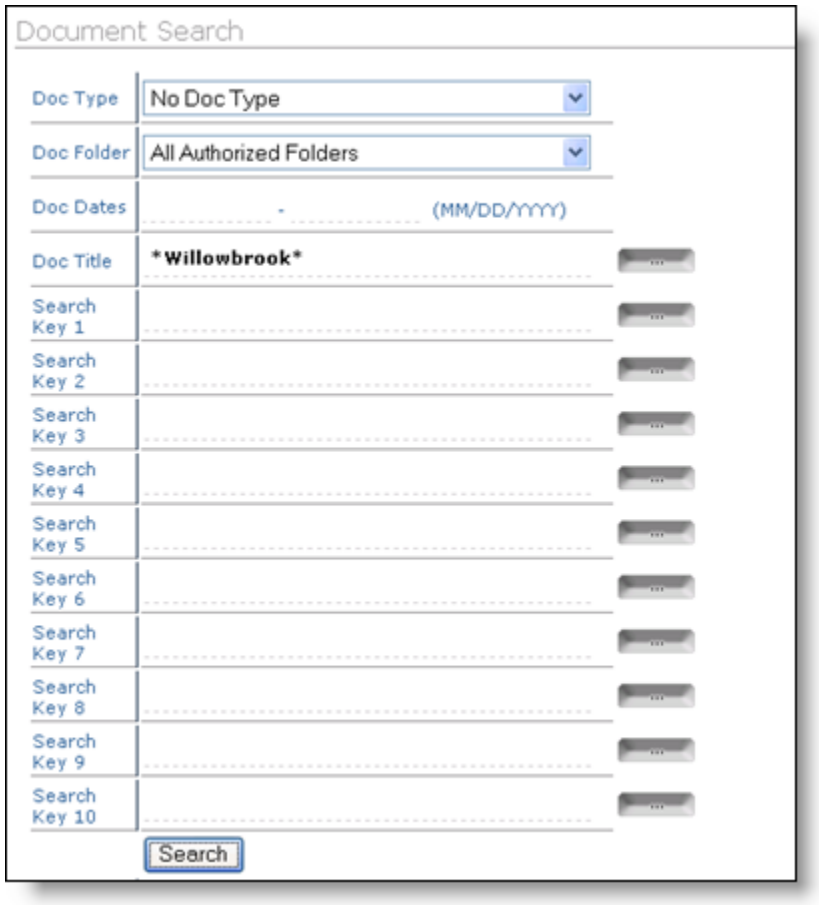
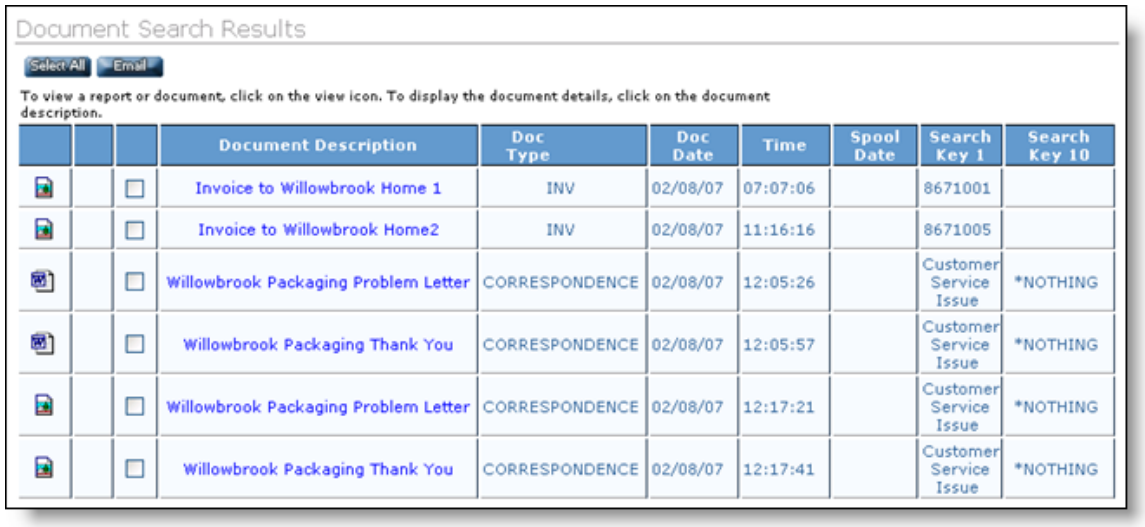


WebDocs returns these search results:



- To search for a Check in the amount of 1141.23:

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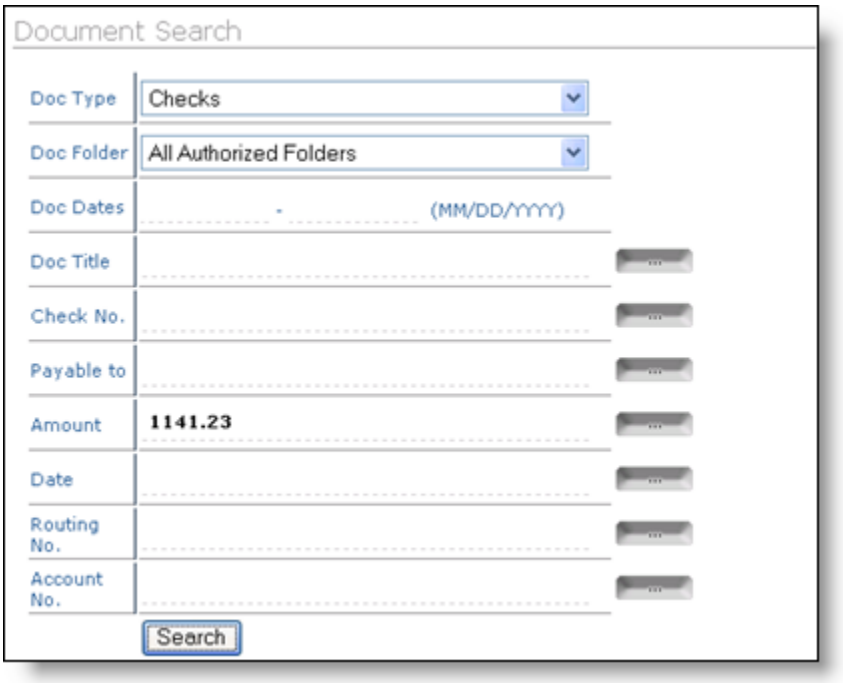
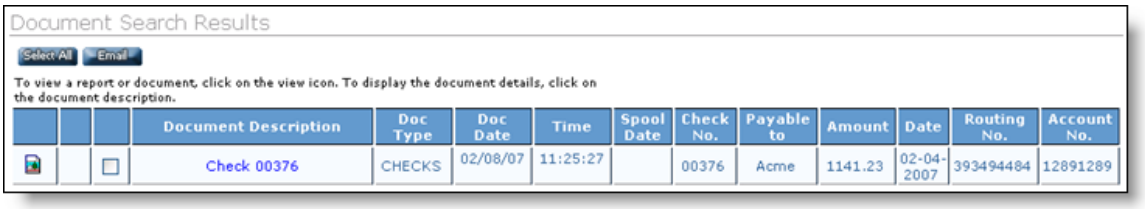


WebDocs returns these search results:



Wildcard Search Example

There are two kinds of wildcard characters.

- The asterisk (*) and the percentage sign (%) search for an unlimited number of characters.

  For example, the string, "J*ne" might yield the results: Jane, June, Jeane, Jeanne, Jacqueline, Joanne, etc.

- The question mark (?) and the underscore (_) search for a single character.

  For example, the string, "J_ne" would yield only the results: Jane and June.

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Adding Links Manually

This topic covers manually adding links so that documents will be found when someone does Link Searches. To actually search using those links, refer to the next topic Using Link Search 47. For a comparison of Document Search, Link Search, and Full Text Search, refer to the introduction to this chapter Finding Documents 36.

If you do not see "Link Search" on the left side of the screen, this feature is not enabled at your company.

Your system administrator will most likely have set up Link Search so that links are added automatically when documents are first uploaded and when a Search Key is updated. These links are called "self-referencing" links. These self-referencing Links guarantee that original documents, not just linked documents, are found when a Link Search is done. If your system administrator has enabled Link Search, you can also add links manually. (Do not worry if that seems confusing at this point. Keep reading!)

To add a link manually:

1. Display the Document Details window for the document for which you want to add a link. Then, click the **Links** button.

   In this example, we will display a check and then add a link to the Invoice for which that check applies. Notice that Invoice Number is not a Search Key; that is why we need the link.

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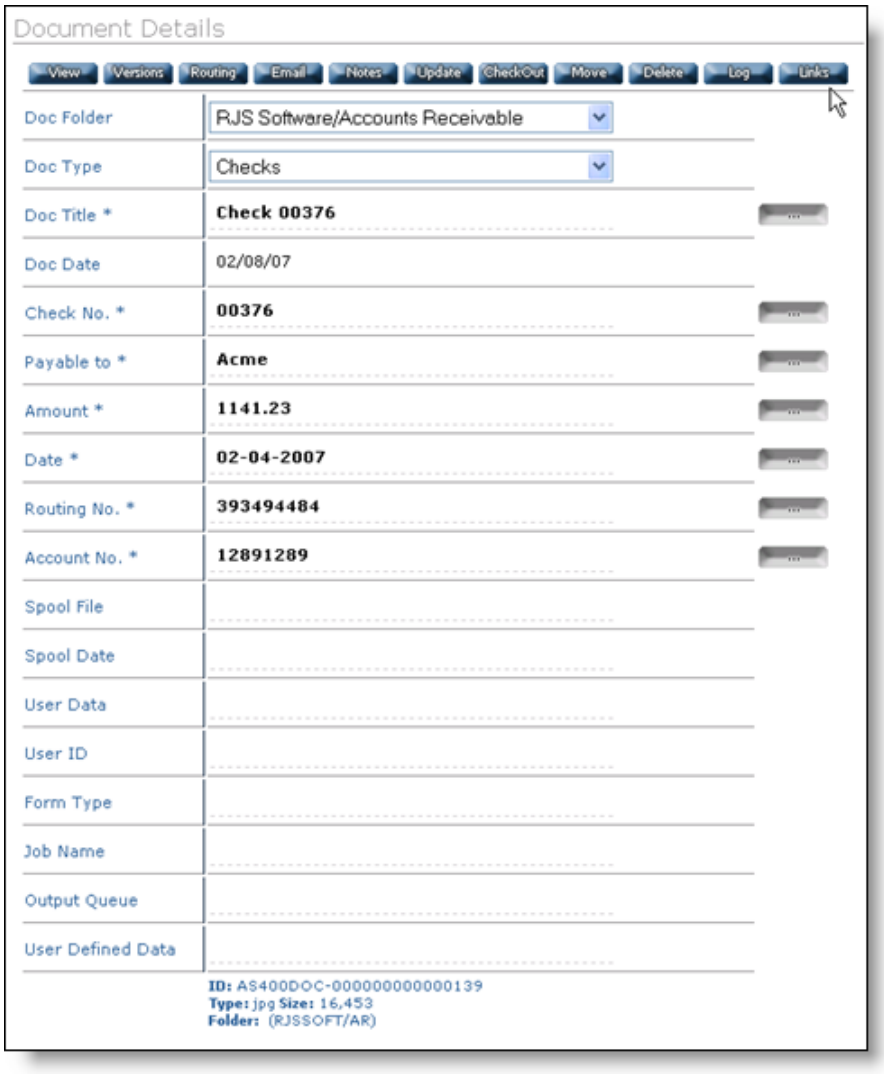
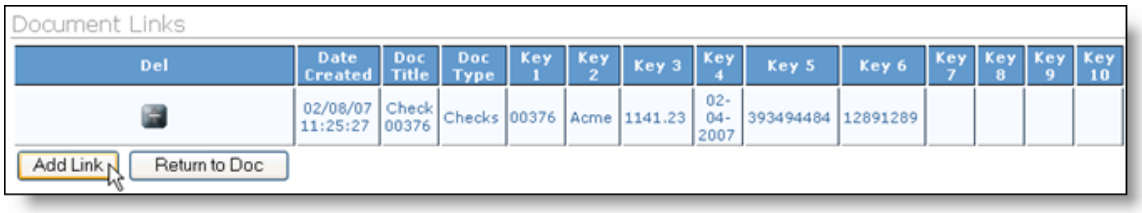


The Document Details window for the Check to which we will add a link

The "Document Links" window for this check displays. So far, this document has only one link: the automatically generated self-referencing link that all documents have if Link Search is turned on.



Existing Links for Check 00376: the "self-referencing" link

2. Click the **Add Link** button.

   The "Document Create Link" window displays.

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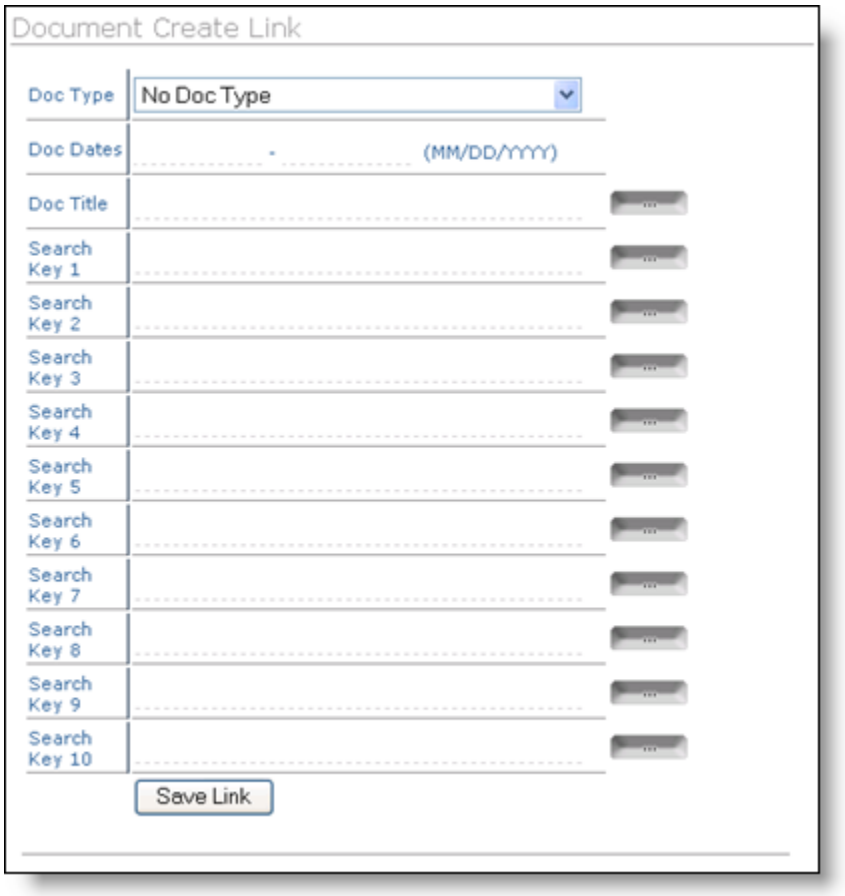

Use the Document Create Link window to identify documents you want linked to the original document

3. Select search criteria to identify documents that you want linked to the original document.

   In this example, we will create a link to any Invoice that has a Purchase Order Number of 8671001, an Invoice Number of 2503012, or an Amount of 1141.23.

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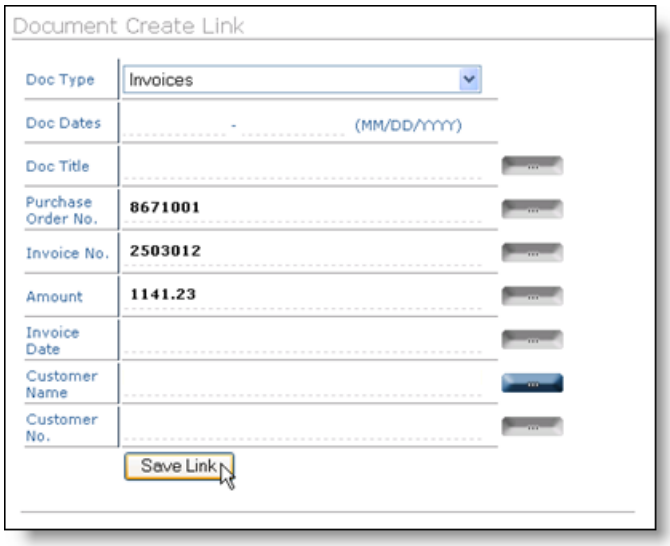
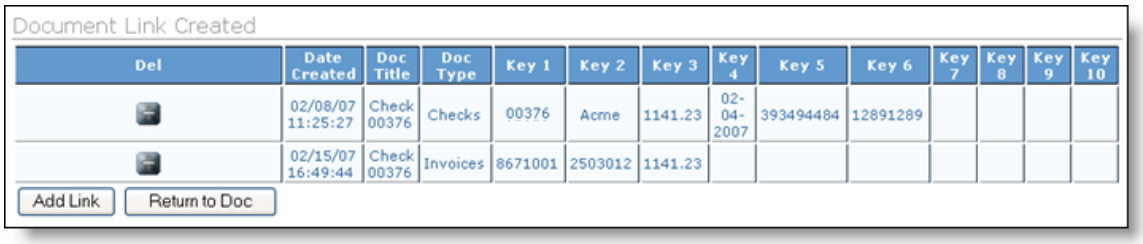


Link to Invoices with specific values

4. Click the **Save Link** button.

   The "Document Link Created" window displays showing the new link. Think of the new link as another way to identify the original document.

   Now, if you do a Link Search using the Search Key 1=8671001, Search Key 2=250301, or Search Key 3=1141.23, the new link guarantees that Check 00376 would be found. In addition, any other documents that meet this search criteria will be found. In this example, the original Invoice for which the check was written also meets this criteria.



   The Link has been successfully added.

For an example of doing a Link Search that finds these Links, refer to Using Link Search 47.

Using Link Search

Use Link Search to search using an alternate set of Search Keys for documents. These alternate Links must have been set up by your system administrator as documents were uploaded or they must have been added manually 44.

If you do not see "Link Search" on the left side of the screen, this feature is not enabled at your company.

This topic provides an overview of how to use Link Search. It may work slightly differently at your company depending on how links were created when documents were uploaded.

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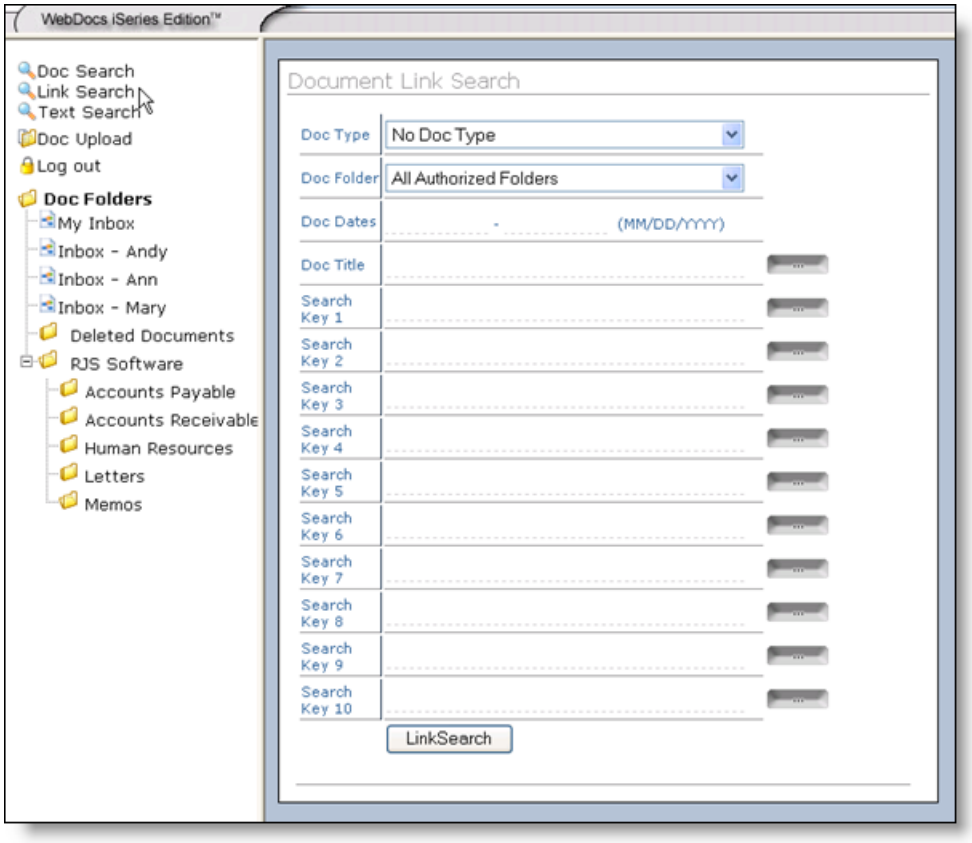
When you use Link Search, WebDocs searches through Folders and Document Types to which you have access rights. It will not return documents that are in Folders or that are of a Document Type to which you do not have access rights.

For a comparison of Document Search, Link Search, and Full Text Search, refer to the introduction to this chapter Finding Documents 36.

To search for documents using Link Search:

1. From the main window, click **Link Search**.

   The "Document Link Search" window displays.



Enter Search Criteria in the Document Link Search window

2. Select the Document Type from the Doc Type drop-down list. When you do this, the specific Search Key labels defined for that Document Type display above the LinkSearch button.

   Note: To search all documents, leave the Document Type in the Doc Type drop-down list set to "No Doc Type." If you select "No Document Type," no key labels display, so using it is only convenient if you know where to enter search criteria.

3. Enter search criteria.

   Use an asterisk (*) or the percentage sign (%) as an wildcard character. Use an underscore (_) or a question mark (?) as a wildcard character that limits the search to a single character. Refer to the Wildcard Search Example 43 for more information on wildcards.

   In this example, we are entering search criteria to find all documents with a Purchase Order

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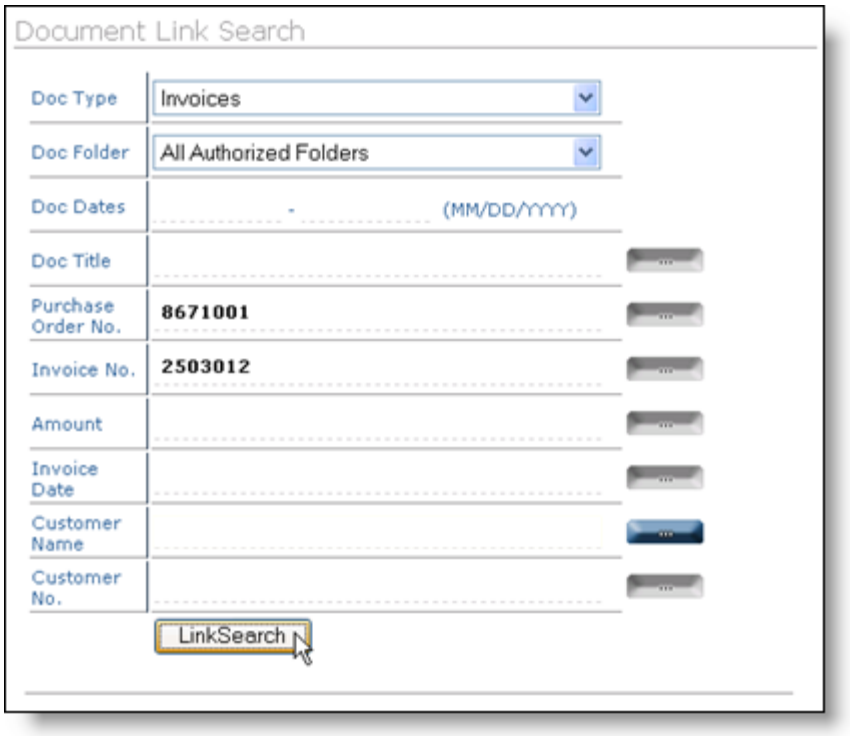
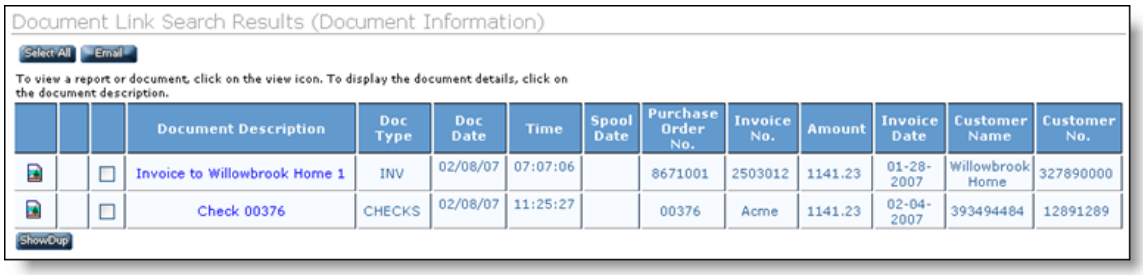
No. of 8671001 and an Invoice No. of 2503012. (Refer to Adding Links Manually 44 to see how we added a Link to this Invoice for Check 00376.)



Entering Link Search criteria

4. Click the **LinkSearch** button.

   The search returns the original self-referencing link to the Invoice that was created when the document was first uploaded, any additional self-referencing links that were created if the Search Keys were changed, and the link to the Check. Links display in the "Document Link Search Results (Document Information)" window.



Link Search results

5. (Optional) To see all links for one document, click the **Show Dup** button. For more information on this feature, refer to Understanding Multiple Links 49 below.

Understanding Multiple Links

It is possible that a Search could return more than one link per document. This typically happens

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when Search Keys are populated on upload by exit programs such that there are multiple values in one field.

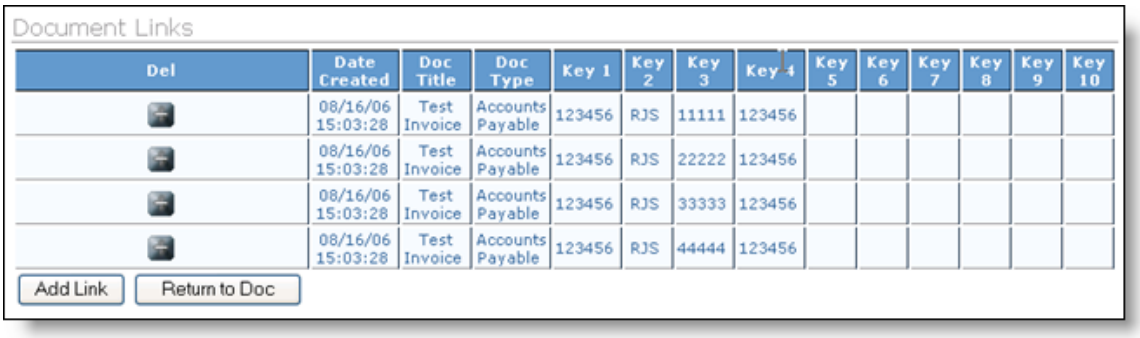
Consider this example:

For the document identified in the "Document Details" window pictured below, there are multiple values in Search Key 3: Invoice Number.

Notice the multiple values in the Invoice Number Search Key

As a result of these multiple values in Search Key 3, four links are created when this document is uploaded.

If you click the **Links** button on the "Document Details" window, all four links display. Each link is the same except for the value in Search Key 3.



Four self-referencing links are created when the document is uploaded

If you do a Link Search that returns this document, the "Document Link Search Results

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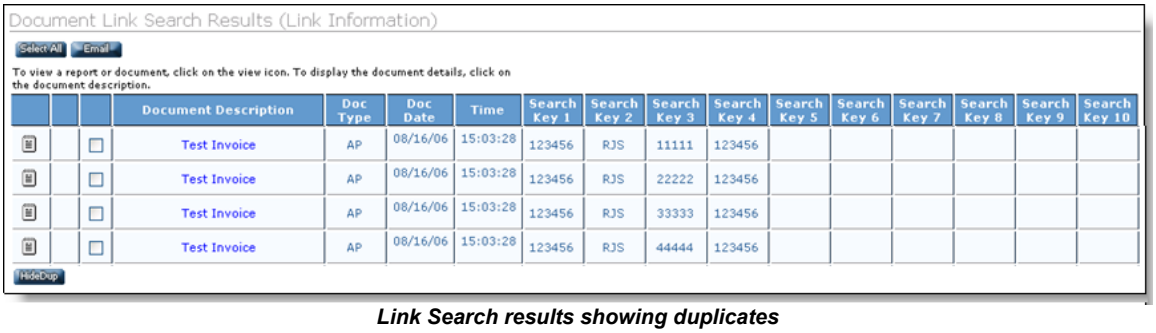
(Document Information)" window displays one line for the found document. Even though there are four links, for your convenience Link Search displays only one line per document.

Link Search results showing duplicates

Click the **ShowDup** button to display one line for *each link* for a document. It displays four lines, since there are four links. The Link Information displays for each link.



Link Search results showing duplicates

Note: Your system administrator controls which display is the default setting for Link Search results: ShowDup or HideDup. Most companies prefer to display one line per document. Regardless of how the default is set, you can always click the **ShowDup** or **HideDup** button to toggle between the two display methods.

Using Full Text Search

Full Text Search allows you to search documents for any text string. You could search for a name, a part number, a ZIP code, etc. This powerful search facility extends the range of your searches beyond the document index information to the actual contents of documents.

When you run a Full Text Search, WebDocs searches for text strings in:

- Word, Excel, PowerPoint, or PDF documents that were uploaded with Full Text Search enabled.
- .TIF documents that were uploaded with Full Text Search enabled and that were scanned using Optical Character Recognition (OCR) using either the Imaging Scan Workstation or the Batch Import Utility.

If you do not see "Text Search" on the left side of the screen, this feature is not enabled at your company. Full Text Search must be enabled and documents must have been uploaded with the feature enabled for Full Text Search to work properly.

When you use Full Text Search, WebDocs searches through Folders and Document Types to which you have access rights. It will not return documents that are in Folders or that are of a Document Type to which you do not have access rights.

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For a comparison of Document Search, Link Search, and Full Text Search, refer to the introduction to this chapter Finding Documents 36.

To use Full Text Search:

1. Click the **Text Search** link.

   The "Full Text Search" window displays.

The Full Text Search window

2. Enter Full Text Search criteria.

   In this example, we will enter search criteria to research a fictitious customer service situation involving the packaging of MX100 wheelchairs and problems with shipments not being shrinkwrapped. We are looking for correspondence or memos about this problem.

   Enter the words ***MX100*** and ***shrink*** in Search Group 1, since we suspect that any documents about this problem would probably contain one of those words. This example is an "or" search. It will return any documents with the word "MX100" or "shrink."

   To search for two or more "and" conditions, use the second Search Group.

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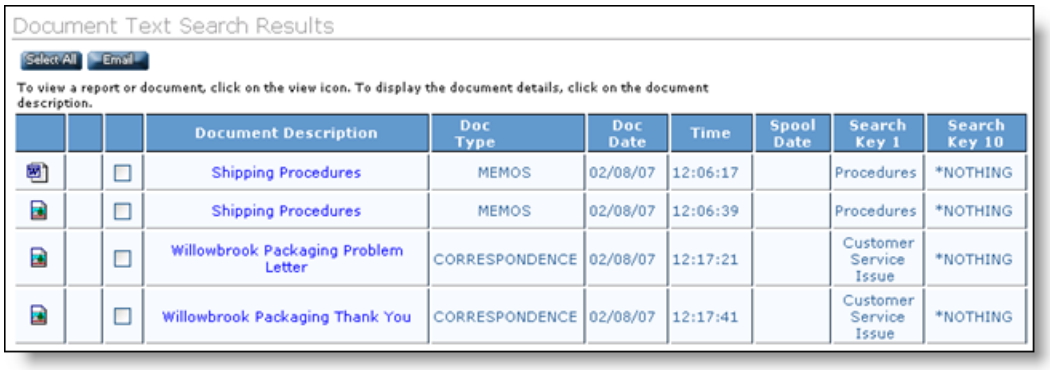
Searching for the strings "MX100" or "shrink"

3. Click the **TextSearch** button.

   The search returns four documents that contain the words "MX100" or "shrink."


Document Text Search Results
Select All
Email
To view a report or document, click on the view icon. To display the document details, click on the document description.

			Document Description	Doc Type	Doc Date	Time	Spool Date	Search Key 1	Search Key 10
		☐	Shipping Procedures	MEMOS	02/08/07	12:06:17		Procedures	*NOTHING
		☐	Shipping Procedures	MEMOS	02/08/07	12:06:39		Procedures	*NOTHING
		☐	Willowbrook Packaging Problem Letter	CORRESPONDENCE	02/08/07	12:17:21		Customer Service Issue	*NOTHING
		☐	Willowbrook Packaging Thank You	CORRESPONDENCE	02/08/07	12:17:41		Customer Service Issue	*NOTHING

Four documents are found: three .TIF images and one Word document.

   Your search is complete at this point. Most likely though you are searching for a reason and now want to investigate your search results.

4. (Optional) Click a document icon to view the document. Click a Document Description to display the "Document Details" window.

   For example, if you click the document with the description "Willowbrook Packaging Problem Letter," the .TIF opens and you can see where the phrase "MX100" or "shrink" appear. (The

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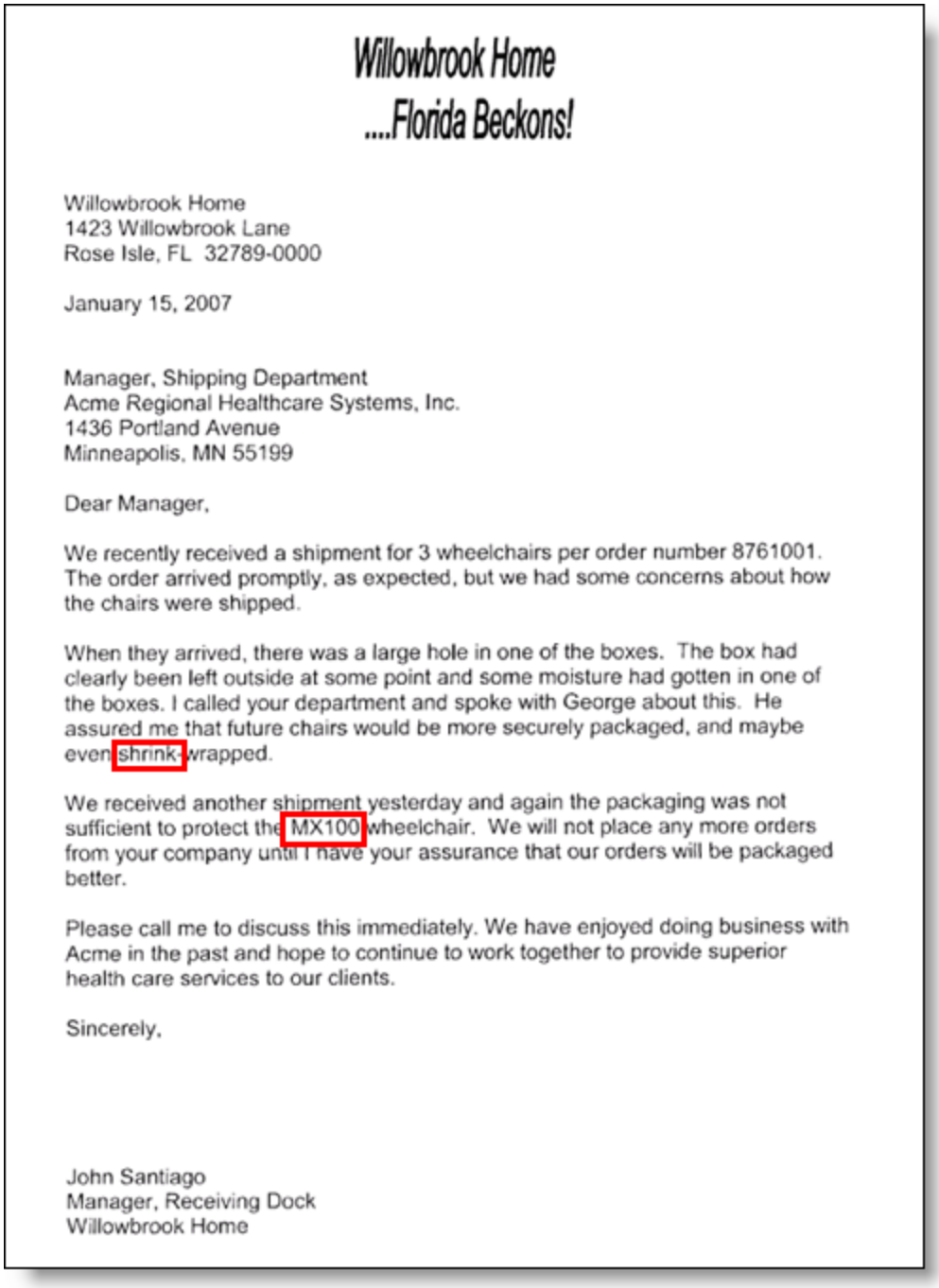
rectangles were added for emphasis.)



Willowbrook Home
....Florida Beckons!

Willowbrook Home
1423 Willowbrook Lane
Rose Isle, FL 32789-0000

January 15, 2007

Manager, Shipping Department
Acme Regional Healthcare Systems, Inc.
1436 Portland Avenue
Minneapolis, MN 55199

Dear Manager,

We recently received a shipment for 3 wheelchairs per order number 8761001. The order arrived promptly, as expected, but we had some concerns about how the chairs were shipped.

When they arrived, there was a large hole in one of the boxes. The box had clearly been left outside at some point and some moisture had gotten in one of the boxes. I called your department and spoke with George about this. He assured me that future chairs would be more securely packaged, and maybe even shrink-wrapped.

We received another shipment yesterday and again the packaging was not sufficient to protect the MX100 wheelchair. We will not place any more orders from your company until I have your assurance that our orders will be packaged better.

Please call me to discuss this immediately. We have enjoyed doing business with Acme in the past and hope to continue to work together to provide superior health care services to our clients.

Sincerely,

John Santiago
Manager, Receiving Dock
Willowbrook Home

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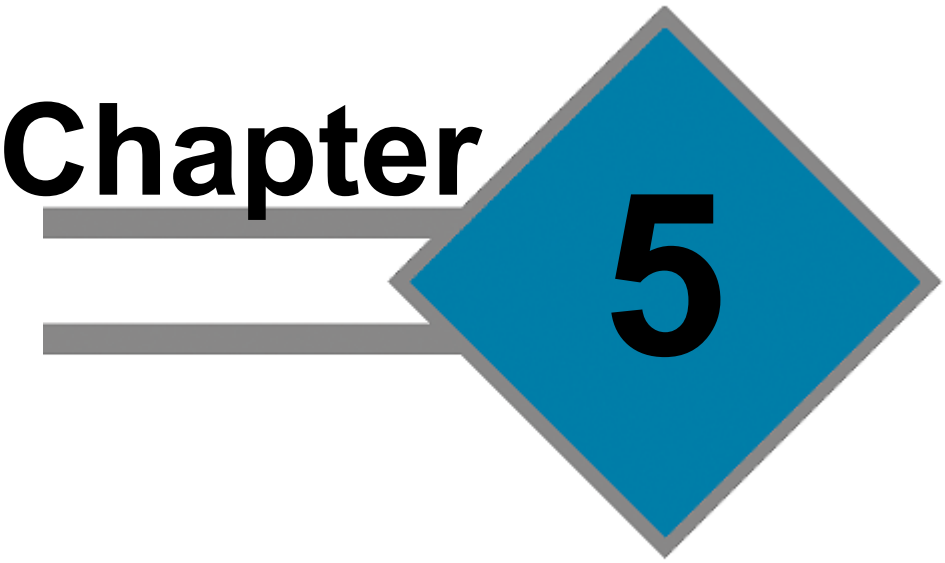

Working with Documents

Working with Documents

Documents are the lifeblood of most companies, and working with documents of one sort or another is what many people do at their jobs every day. WebDocs makes it easy for you to work with documents: to view them, revise them, add notes to them, email them to contacts outside of your organization, etc.

Most of the work you do with documents is from the Document Details window. For an overview of the buttons on this window, refer to Overview of Working with Documents 30. This chapter provides step-by-step instructions for working with the buttons on this window.

This chapter includes the following topics:

Viewing Documents 56

Emailing Documents 59

Adding Notes to Documents 66

Updating Document Index Information 69

Using Custom Lookups 72

Moving Documents Between Folders 76

Deleting Documents 78

Viewing the Audit Log 79

Viewing Documents

When you view a document in WebDocs, the document opens in the application associated with that document. For example, Microsoft Word documents open in Word. PDF documents open in Adobe Acrobat.

You can view a document from any List window (e.g., a Folder List or a Search Results window) or from the "Document Details" window 58. Both methods are covered in this topic.

Viewing a Document from a List window

To view a document from Folder or from a Search Results Window:

1. Find the document that you want to view.

   If you know what Folder it is in and can easily find it that way, click the Folder name to display the Document List for the Folder.

   If you cannot easily find it in a Folder, use one of the search methods described in the Finding Documents 36 chapter.

   In this example, we searched for an invoice from Russell Johnson. We can tell that it is a Word document because the document icon is for a Microsoft Word document.

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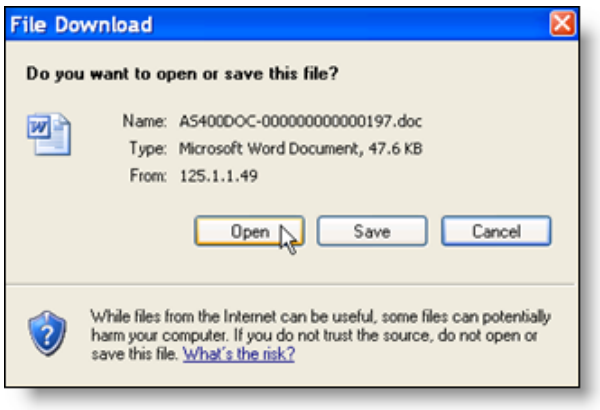
One document matched the search criteria

2. Click the **Document Icon** to view the document.

   The "File Download" window displays.


File Download
Do you want to open or save this file?
Name: AS400DOC-000000000000197.doc
Type: Microsoft Word Document, 47.6 KB
From: 125.1.1.49
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

The File Download window

3. Click the **Open** button to view the document.

   The document opens in the application associated with that Document Type. If the application is not already running, it will be started. In this example, the document opens in Microsoft Word.

   Note: Do not worry about the WebDocs document name (in this example it is AS400DOC-000000000000197.doc). WebDocs assigns a name for internal tracking purposes. You do not need to know or remember this name.

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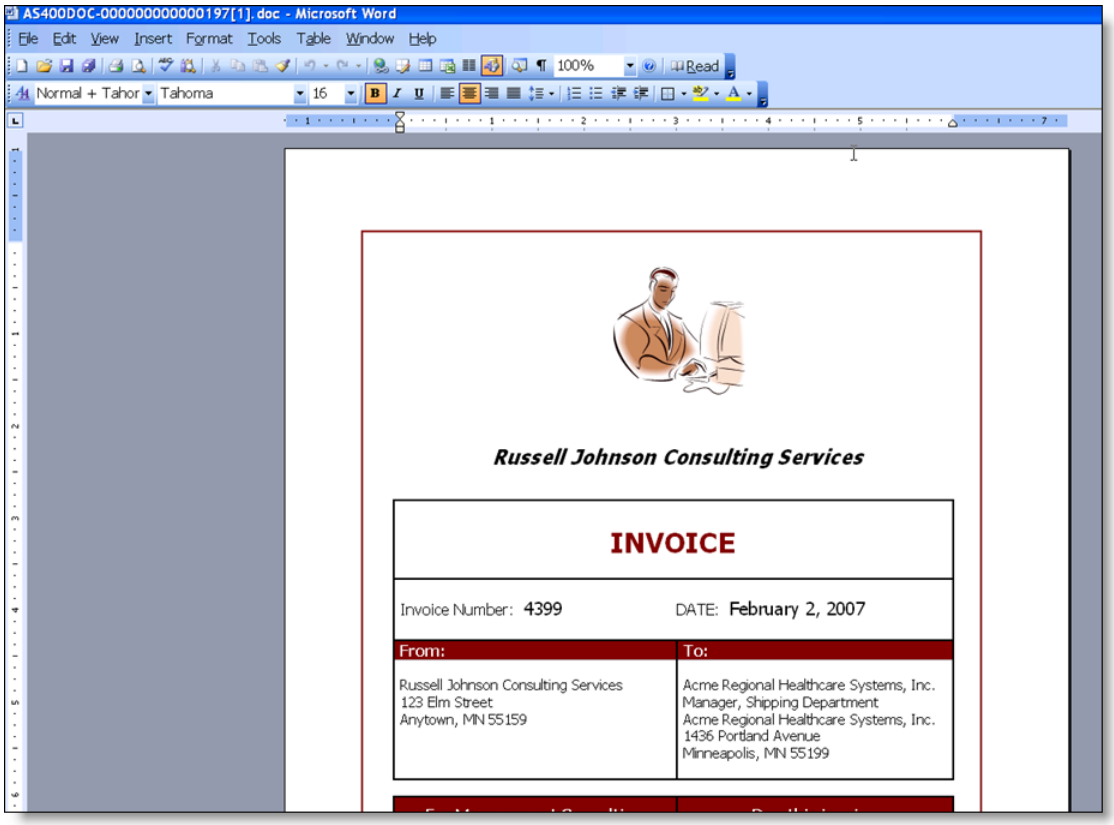

The document opens in Word (or whatever application is associated with it)

With the document open in View mode, you can:

- Use **File > Save As** (or similar menu options) to save a copy of the document to a new location outside of WebDocs.
- Check out and update the document. refer to Checking Out, Revising, and Checking Documents 84.
- If your company uses the Microsoft Office Add-Ins component, you can check out the document from Microsoft Word or Microsoft Excel. For more information, refer to Checking Out Open Documents from Word or Excel 105.

Viewing a Document from the Document Details window

To view a document from the Document Details window:

1. Display the "Document Details" window for the document you want to view.

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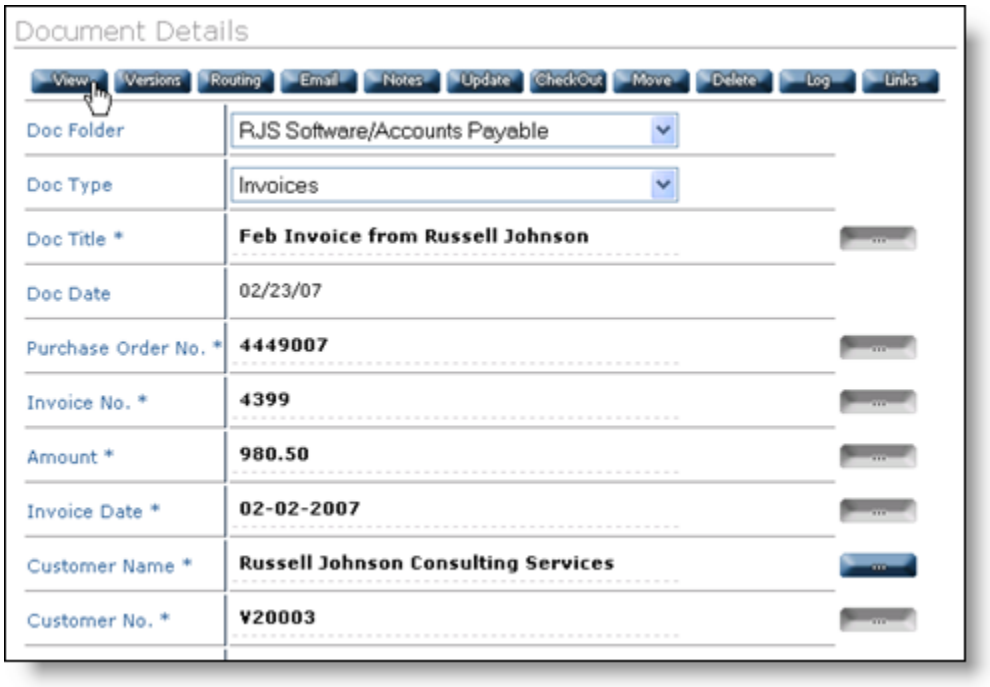
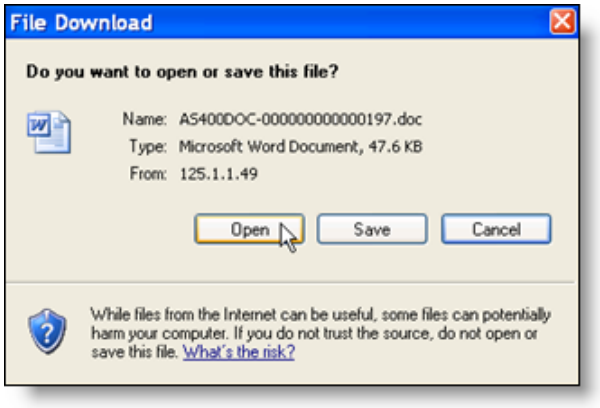


Click the View button on the Document Details window

2. Click the **View** button.

   The "File Download" window displays.


File Download
Do you want to open or save this file?
Name: AS400DOC-000000000000197.doc
Type: Microsoft Word Document, 47.6 KB
From: 125.1.1.49
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

The File Download window

3. Step 3 is the same as above, as are your options once the document is open.

Emailing Documents

If your system administrator has configured this feature and you have access rights to do so, you can email a document directly from WebDocs.

If the Email button does not display, you do not have access rights to this feature. Contact your system administrator for more information.

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This topic covers the places from which you can email documents:

- A "Document Details" window - to email one document.
- A List window 62 - to email one or more documents.

This topic also covers using the WebDocs Address Book 64.

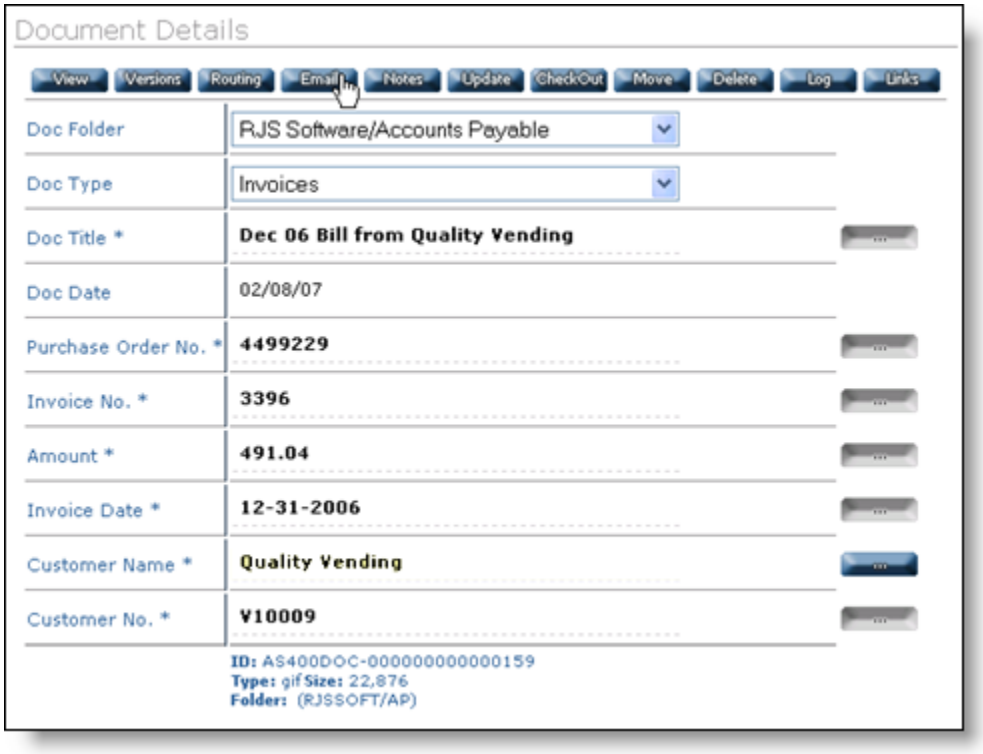
Emailing from a "Document Details" window

Use this method of emailing a document if you are already in a "Document Details" window and you want to email this document to someone.

To email from a "Document Details" window:

1. Display the "Document Details" window for the document that you want to email.

   In this example, we will email the document titled "Dec 06 Bill from Quality Vending."



Click the Email button to email this document

2. Click the **Email** button.

   The "Email Document" window displays. The Doc Title, the From, and the Subject fields are automatically filled in. The From email address is the email address associated with your Username. (Your system administrator will have set this up for you).

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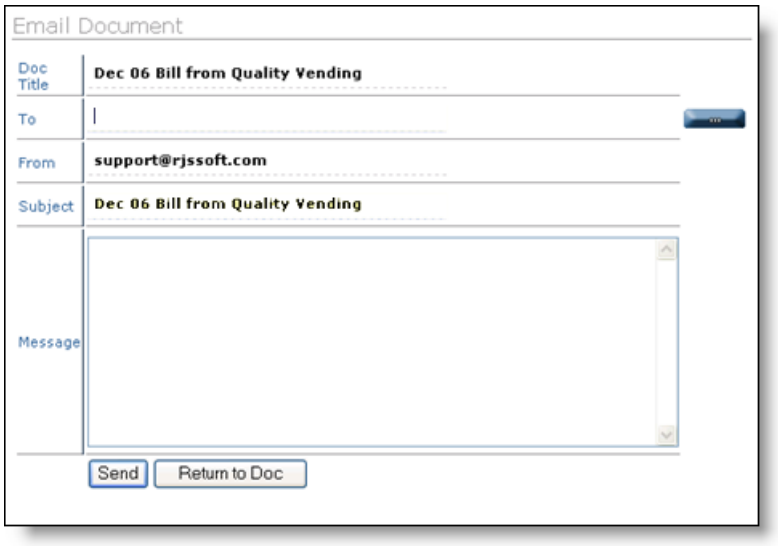

Fill in the email address to send the document to

3. Enter one or more email addresses in the **To** field. Use a comma to separate addresses. You can enter up to 60 characters of data in this field.

   To select email addresses from your WebDocs address book, click the button next to the To field. For more information, refer to using the address book 64 below.

4. (Optional) To use a different Subject line, enter it over the default Subject.

5. (Optional) Enter any text you want in the body of the email in the Message box.

   In this example, we are sending this document to one email address with a quick note to the recipient.

The Email Document window all filled in

6. Press the **Send** button.

   The email is sent. A confirmation message displays in the right side of the WebDocs window.

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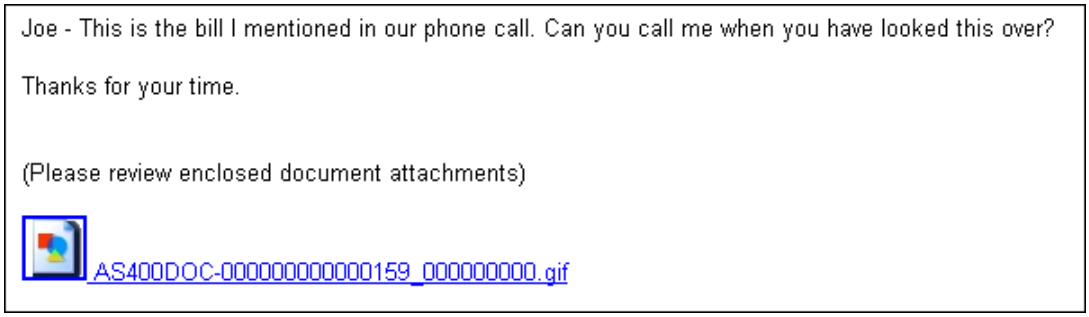
Document was mailed to joe@anycompany.com
Go back and select another document to work with or select another email recipient

The email recipient(s) get an email that looks like this:


Joe - This is the bill I mentioned in our phone call. Can you call me when you have looked this over?
Thanks for your time.
(Please review enclosed document attachments)
AS400DOC-000000000000159_000000000.gif

Emailing from a List window

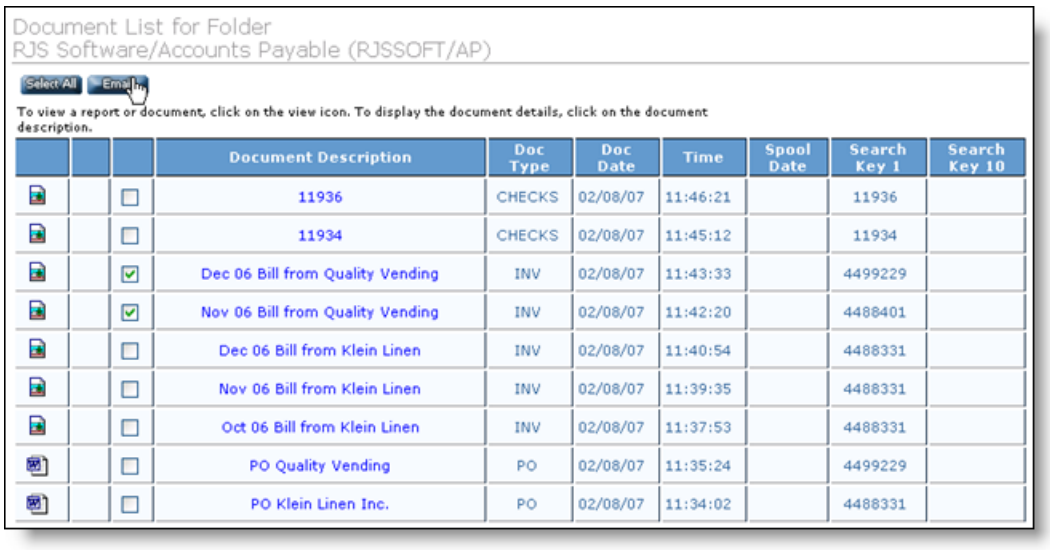
A list window provides summary information for one or more documents. It could be a Folder List or a Search Results window.

To email from a list screen.

1. Select one or more documents to email by clicking in the selection check box next to each document.

   Note: Click the **Select All** button to email all documents in a Document List. You may want to first do a Search to identify a group of documents that you want to email.

   In this example, we have selected two bills from Quality Vending.


Document List for Folder
RJS Software/Accounts Payable (RJSSOFT/AP)
Select All
Email
To view a report or document, click on the view icon. To display the document details, click on the document description.
Document Description
Doc Type
Doc Date
Time
Spool Date
Search Key 1
Search Key 10
11936 CHECKS 02/08/07 11:46:21 11936
11934 CHECKS 02/08/07 11:45:12 11934
Dec 06 Bill from Quality Vending INV 02/08/07 11:43:33 4499229
Nov 06 Bill from Quality Vending INV 02/08/07 11:42:20 4488401
Dec 06 Bill from Klein Linen INV 02/08/07 11:40:54 4488331
Nov 06 Bill from Klein Linen INV 02/08/07 11:39:35 4488331
Oct 06 Bill from Klein Linen INV 02/08/07 11:37:53 4488331
PO Quality Vending PO 02/08/07 11:35:24 4499229
PO Klein Linen Inc. PO 02/08/07 11:34:02 4488331

Two documents are selected

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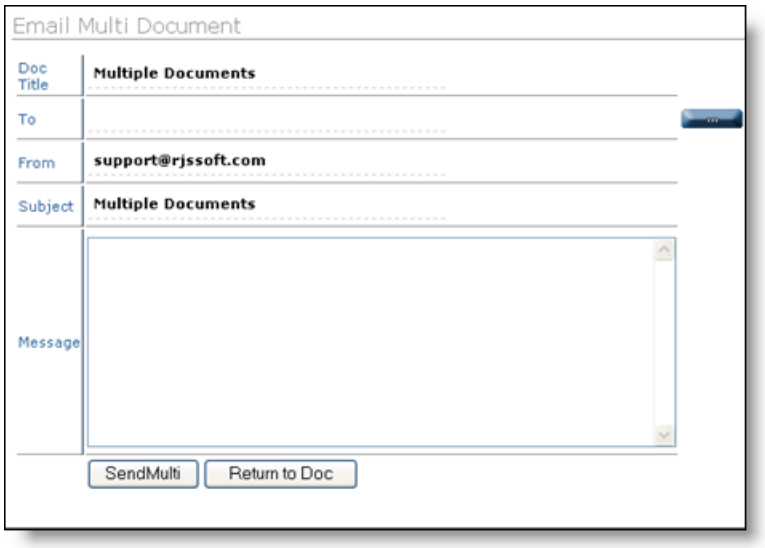
2. Click the **Email** button.

   The "Email Multi Document" window displays. The Doc Title, the From, and the Subject fields are automatically filled in. The phrase "Multiple Documents" displays for the Doc Title and the Subject. The From email address is the email address associated with your Username. (Your system administrator will have already set this up for you.)



Default information in the Email Multi Document window

3. Enter one or more email addresses in the **To** field. Use a comma to separate addresses. You can enter up to 60 characters of data in this field.

   To select email addresses from your WebDocs address book, click the button next to the To field. For more information, refer to using the address book 64 below.

4. (Optional) To use a different Subject line, enter it over the default Subject "Multiple Documents."

   In this example, we are sending these two documents to two email addresses.

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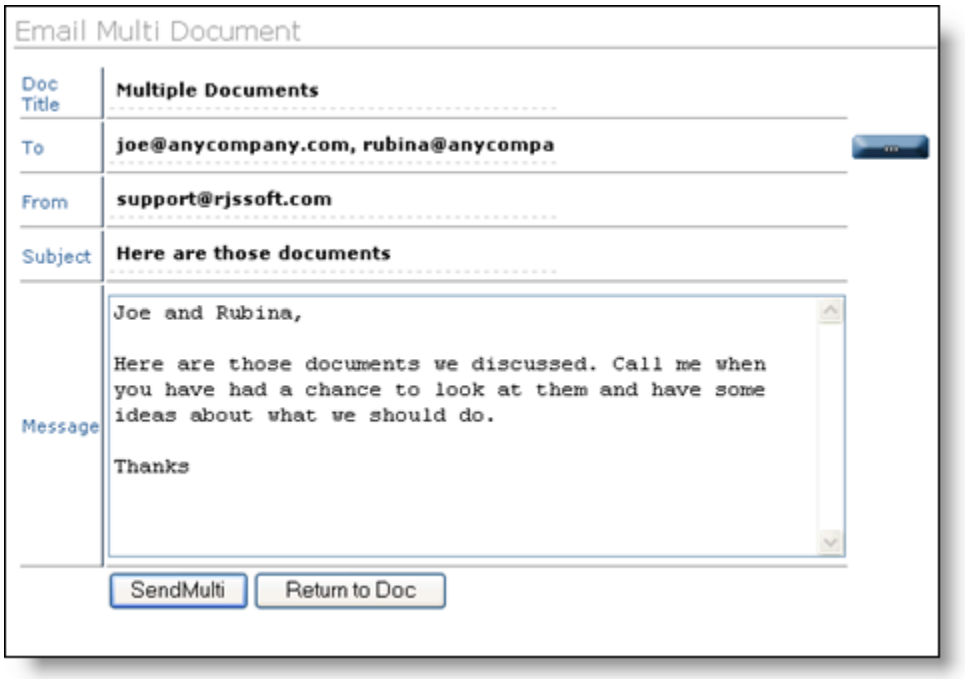
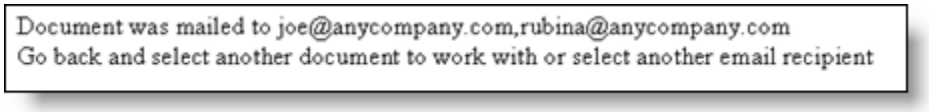


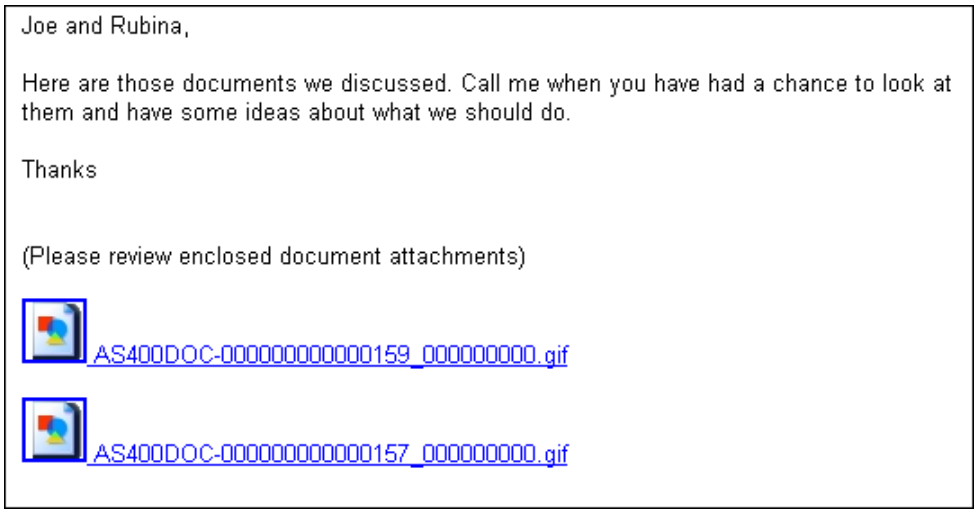
The Email Multi Document window all filled in

5. Click **SendMulti** to send the email.

   The email is sent. A confirmation message displays in the right side of the WebDocs screen.


Document was mailed to joe@anycompany.com,rubina@anycompany.com
Go back and select another document to work with or select another email recipient

   The email recipient(s) get an email that looks like this:


Joe and Rubina,
Here are those documents we discussed. Call me when you have had a chance to look at them and have some ideas about what we should do.
Thanks
(Please review enclosed document attachments)
AS400DOC-000000000000159_000000000.gif
AS400DOC-000000000000157_000000000.gif

Using the WebDocs Address Book

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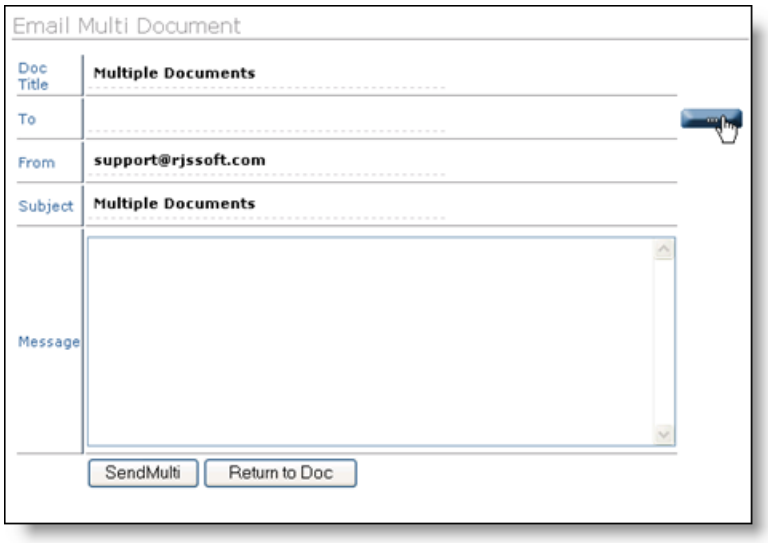
WebDocs allows you to maintain a simple address book of contact information. For each contact, you can store an email address, a contact name, a company name, a voice phone number, and a fax phone number. For now, the email address is the only piece of data that is used, but the rest is available for your reference and for future enhancements.

To select an email address from the address book:

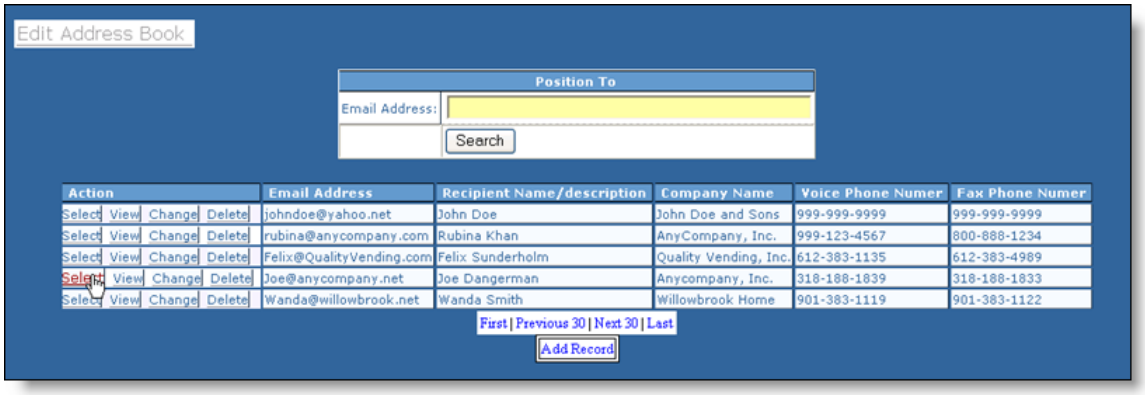
1. On the "Email Document" or the "Email Multi Document" window, click the button next to the To field.



Click the button to open the Address Book

The "Edit Address Book" window displays.

In this example, there are already five addresses in the address book.



Address Book with five addresses

2. Click the **Select** link next to the email address to which you want to send the document.

   In this example, we selected the email address for Joe Dangerman.

   This adds Joe Dangerman's address (joe@anycompany.net) to the email window.

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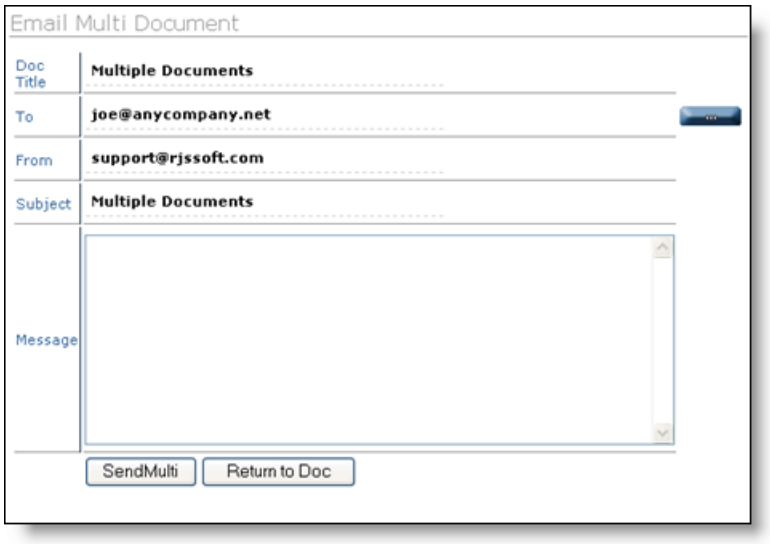

The email address is added

3. To add another address to this email, click the button again and select another address.

Adding Notes to Documents

Notes are text that is associated with a document. Notes are identified by the date and time they were created and the user that created it.

If your company is using the Document Routing feature, Notes may also be added as documents are approved or rejected from each Inbox. For more information about Document Routing, refer to the chapter Using Document Routing 112.

If the Notes button does not display, you do not have access rights to this feature. Contact your system administrator for more information.

To add Notes for a document:

1. Display the "Document Details" window for the document.

   In this example, we will view and then add a new Note for the document "Feb Invoice from Russell Johnson."

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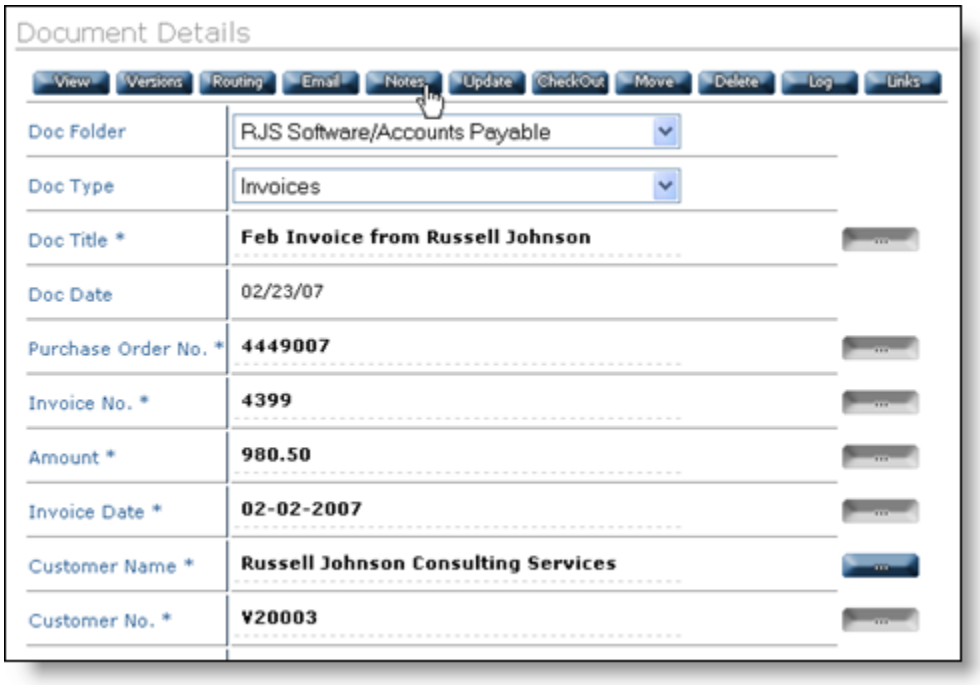
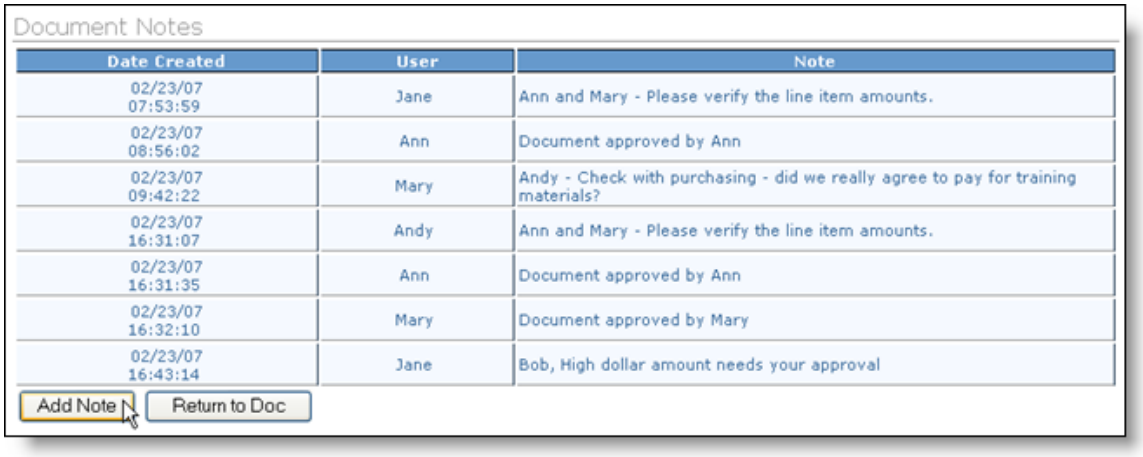


Document for which we will view Notes

2. Click the **Notes** button.

   The "Document Notes" window displays. If there are no Notes, the window displays with no rows. If Notes already exist, a row displays for each Note.

   The document in this example has a lot of Notes associated with it because it was routed to several users using the Document Routing feature.



There are already seven Notes for this document

3. Click the **Add Note** button.

   The "Enter Note Text" window displays.

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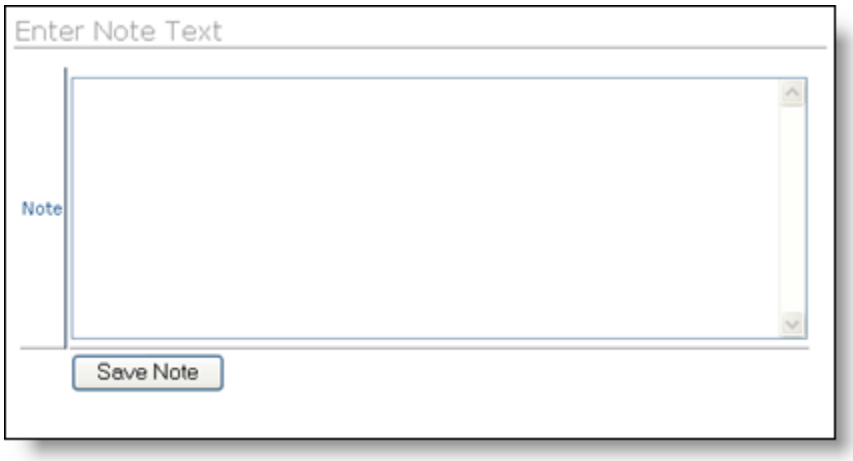
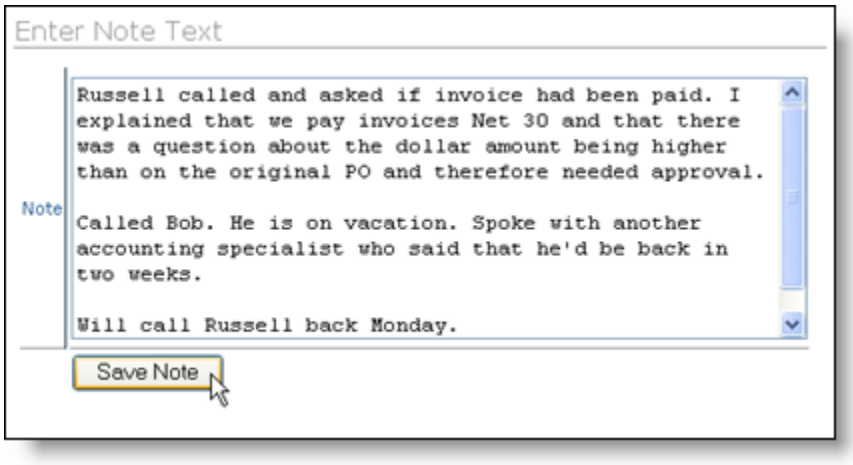


Enter Note here

4. Enter the Note in the text box. You can enter an unlimited amount of text. A scroll bar displays if you enter more text than can display in one screen. You can also paste text from the Windows clipboard.


Enter Note Text
Note
Russell called and asked if invoice had been paid. I explained that we pay invoices Net 30 and that there was a question about the dollar amount being higher than on the original PO and therefore needed approval.
Called Bob. He is on vacation. Spoke with another accounting specialist who said that he'd be back in two weeks.
Will call Russell back Monday.
Save Note

Note entered for this document

5. Click the **Save Note** button.

   The "Document Notes" window displays again with the new Note.

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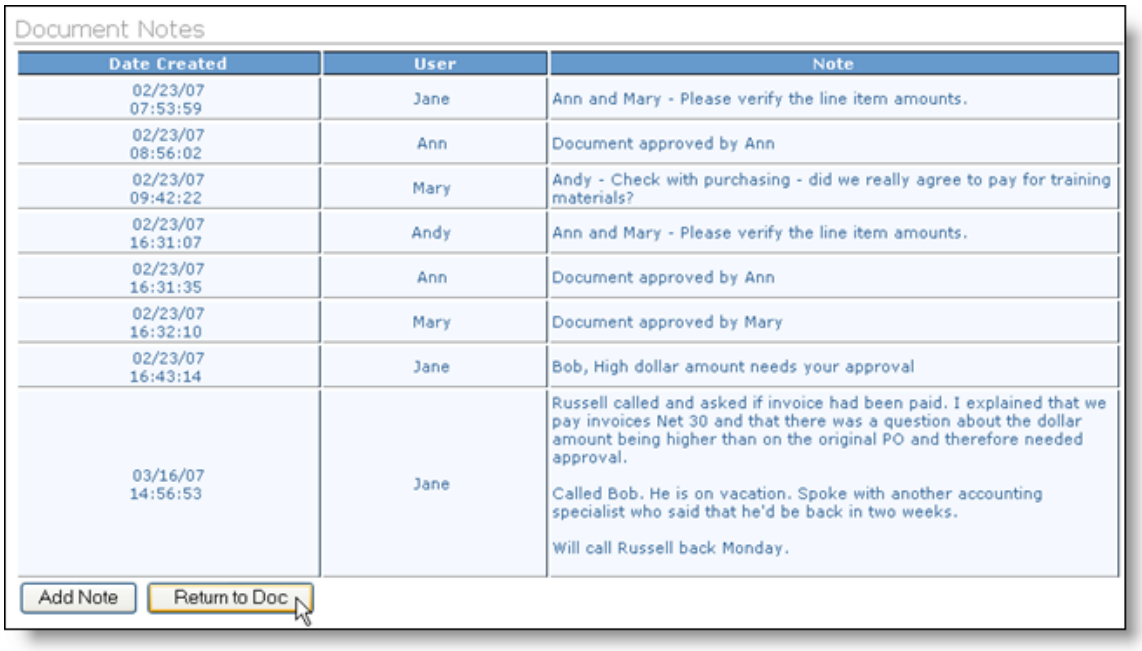
Document Notes
Date Created
User
Note
02/23/07 07:53:59
Jane
Ann and Mary - Please verify the line item amounts.
02/23/07 08:56:02
Ann
Document approved by Ann
02/23/07 09:42:22
Mary
Andy - Check with purchasing - did we really agree to pay for training materials?
02/23/07 16:31:07
Andy
Ann and Mary - Please verify the line item amounts.
02/23/07 16:31:35
Ann
Document approved by Ann
02/23/07 16:32:10
Mary
Document approved by Mary
02/23/07 16:43:14
Jane
Bob, High dollar amount needs your approval
03/16/07 14:56:53
Jane
Russell called and asked if invoice had been paid. I explained that we pay invoices Net 30 and that there was a question about the dollar amount being higher than on the original PO and therefore needed approval.
Called Bob. He is on vacation. Spoke with another accounting specialist who said that he'd be back in two weeks.
Will call Russell back Monday.
Add Note
Return to Doc

The new Note displays on the Document Notes window

6. Click the **Return to Doc** button.

   The "Document Details" window displays again.

Updating Document Index Information

When a document is uploaded in WebDocs, document index information is created. This information identifies this document. This index information (the Doc Folder, Doc Type, Doc Title, the Doc Date, and the Search Keys) is useful for identifying documents and also for understanding at a glance some information about the document.

Occasionally you may need to update this information. This typically happens if there was an error in the original information or if you learn something new about a document.

To update document index information:

1. Display the "Document Details" window for the document.

   In this example, we will update index information for the document "Feb Invoice from Russell Johnson."

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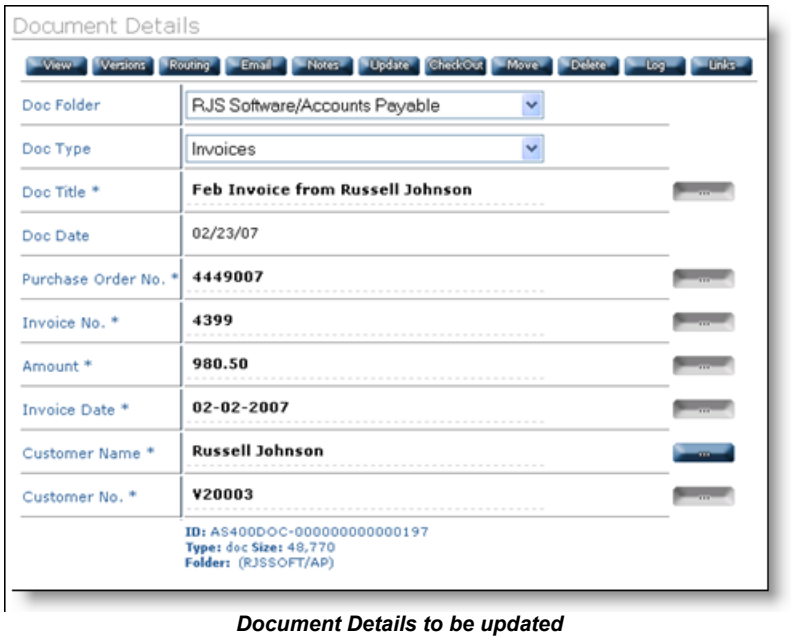

Document Details to be updated

Note: If your company is using Document Routing, and you display Document Details for a document that is currently in your Inbox, additional buttons display at the bottom of your screen:

You can use these buttons to quickly approve or reject a document. Refer to Approving or Rejecting Documents in an Inbox 116 for more information.

2. Revise any of the fields on the "Document Details" window: the Doc Folder, Doc Type, Doc Title, or any of the Search Keys. To change any field, just enter the new information.

   In this example, assume that the document was not uploaded with the correct Customer Name. We will change the Customer Name from "Russell Johnson" to "Russell Johnson Consulting Services."

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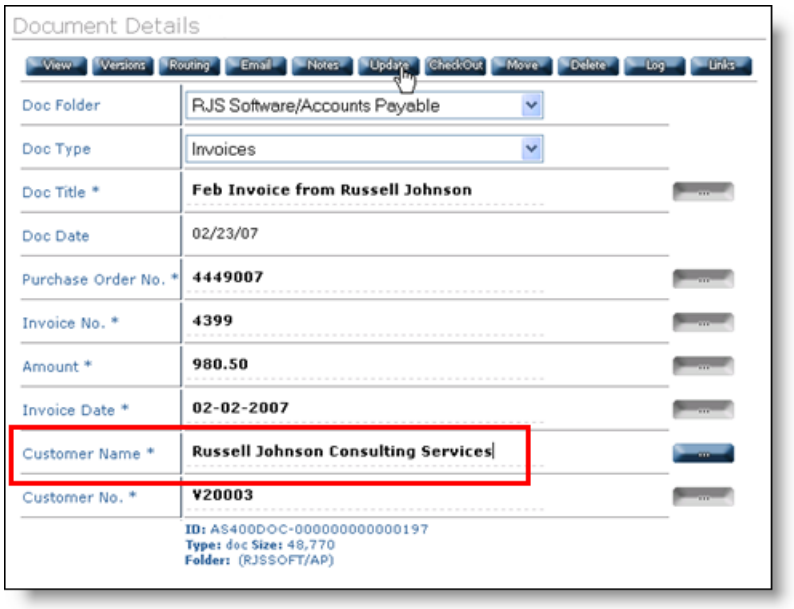
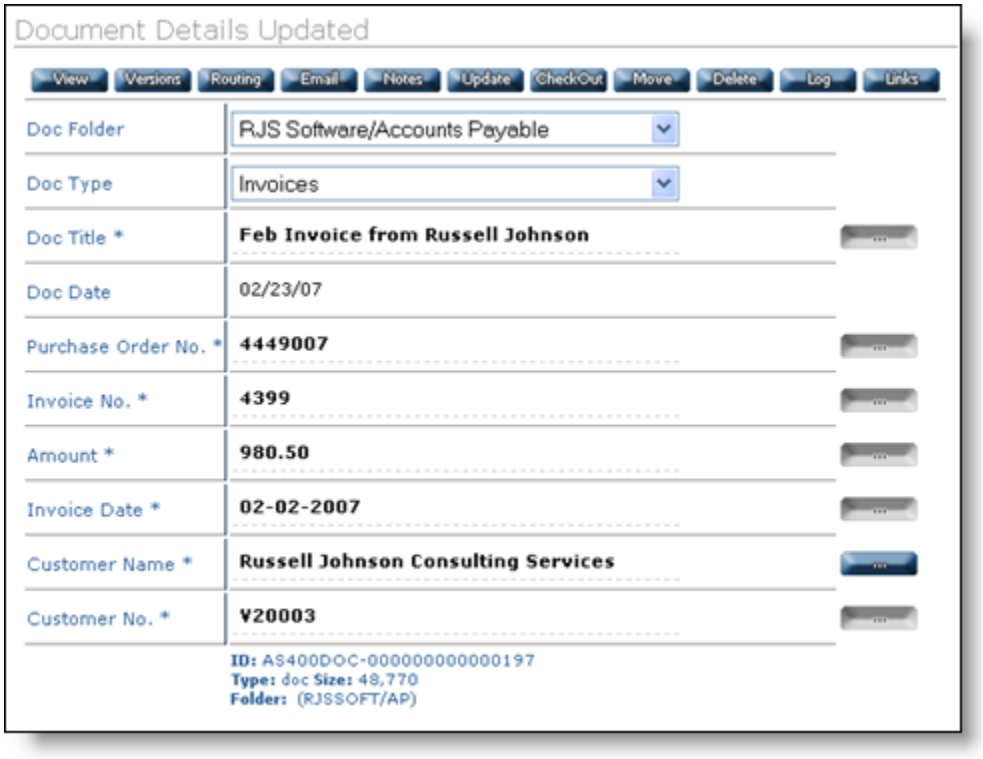


We changed the value in the Search Key: Customer Name

3. Click the **Update** button.

   The Customer Name is updated.



Document Details Updated displays at the top of the screen

Note: If your company is using Link Search 47, the self-referencing link that was created when

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this document was first uploaded will not be updated. It will still contain the original Document Details. However, a new link will be created with the new Document Details. If you are not sure whether your company uses Link Search, look in the upper left of your screen. If this feature is enabled at your company, "Link Search" displays under "Doc Search."

Using Custom Lookups

Custom Lookups are special popup windows that your system administrator can create. These popup windows are used to display items from a list so that you can select one. This can save you time entering data and can also (depending on how it is set up), ensure that you select a value from a predefined list thereby preventing you from entering invalid data.

You can use Custom Lookups when you are uploading documents or when you are identifying search criteria. Sometimes you can enter information in fields that have Custom Lookups. Sometimes the only way to enter information is to select it from the Custom Lookup. This depends on how the Custom Lookup was set up.

Custom Lookups can read data from WebDocs files or from other databases that your company uses. For example, your system administrator could set up Custom Lookups to create a popup window to display:

- Vendor names and numbers from your enterprise purchasing system.
- Item or part numbers from a warehouse distribution system.
- Customer names and customer numbers that have already been entered in WebDocs.

Custom Lookups can contain up to two columns. Each column is searchable and if data appears in a blue font, it is "clickable." That means that you can click to select it. You can scroll through items in a Custom Lookup popup window, or search within a Custom Lookup window 75.

You can tell when a field has a Custom Lookup associated with it because the Custom Lookup button is enabled. When it is not enabled, the button is grey. When it is enabled, it is blue.

To select an item from a Custom Lookup:

1. Click the **Custom Lookup** button next to the field Customer Name.

   In this example, we are uploading an Invoice. Instead of entering (i.e., typing) the Customer Name, we will select it.

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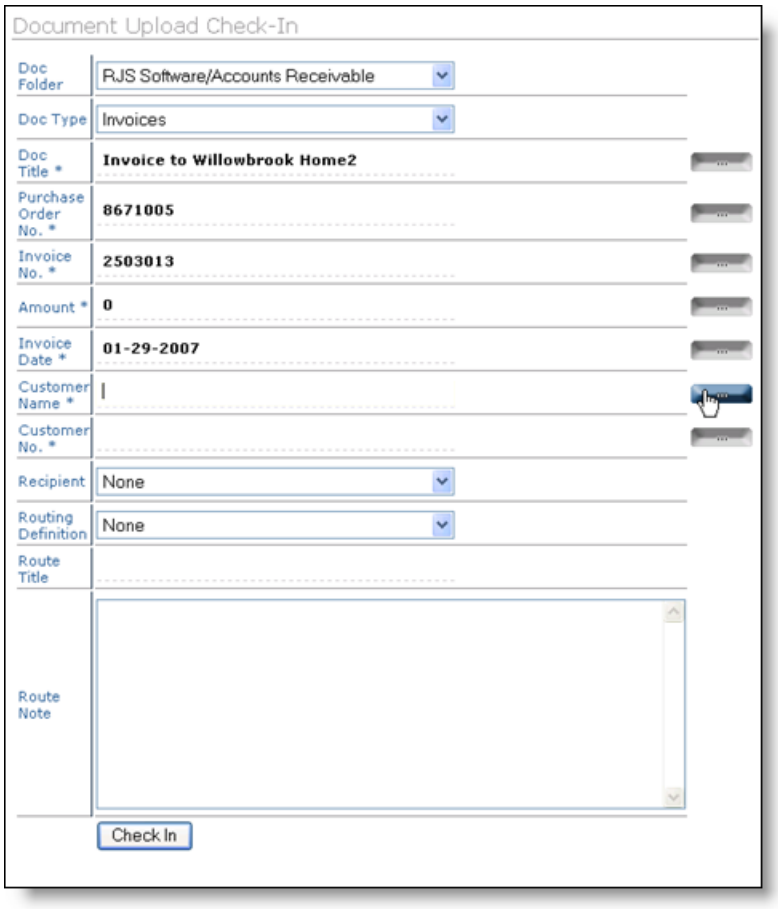
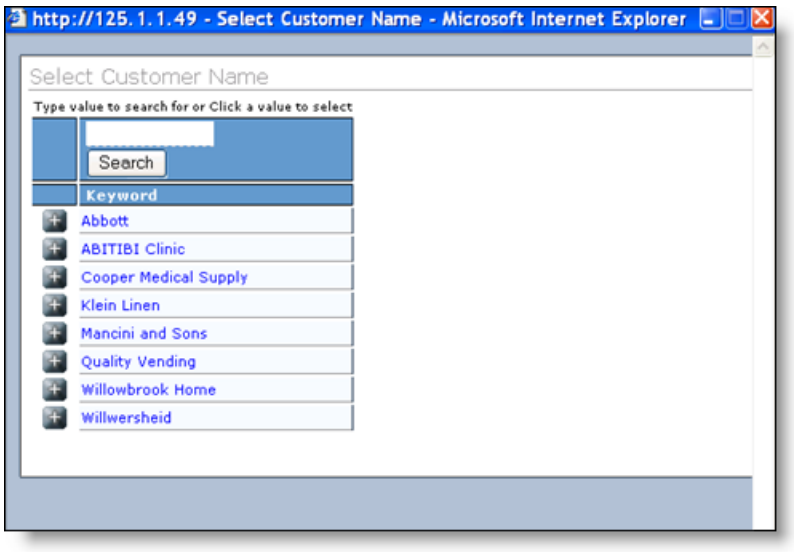


A Custom Lookup on the Document Upload Check-In window

A Custom Lookup popup opens from which you can select a value. In this example, a Custom Lookup was set up to display all Customer Names that have already been entered in WebDocs. So far, eight Customer Names have been entered in WebDocs.



A Custom Lookup window for Customer Name

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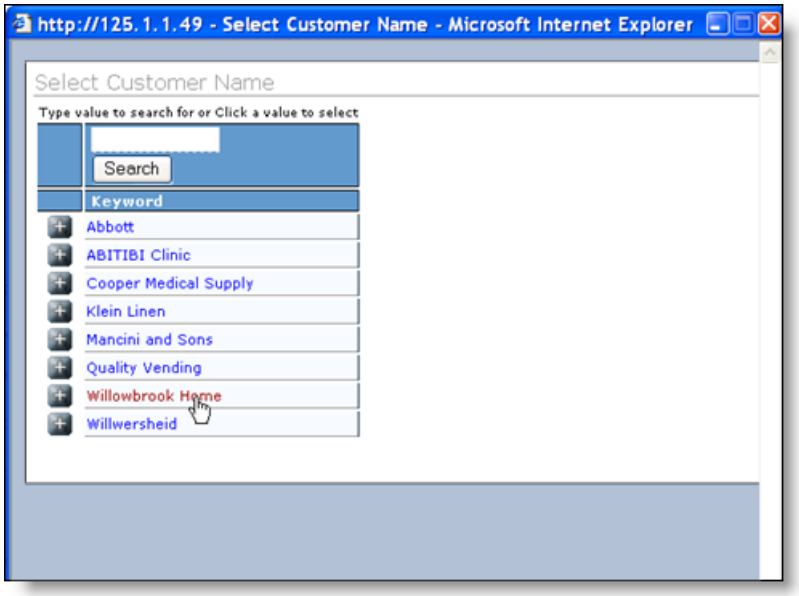
2. Select a Customer Name by clicking either the plus sign next to the Customer Name or the actual Customer Name (blue text link) itself.

   Note: Some Custom Lookups have columns that are not clickable. These columns typically provide more information about the value in the corresponding column. For example, there may be a code in the clickable column with an explanation of the code in the column that is not clickable.

   In this example, we are selecting the Customer Name **Willowbrook Home**.



Selecting Willowbrook Home from the Custom Lookup Popup

The Customer Name you selected displays in the Customer Name field. The Custom Lookup popup window closes automatically.

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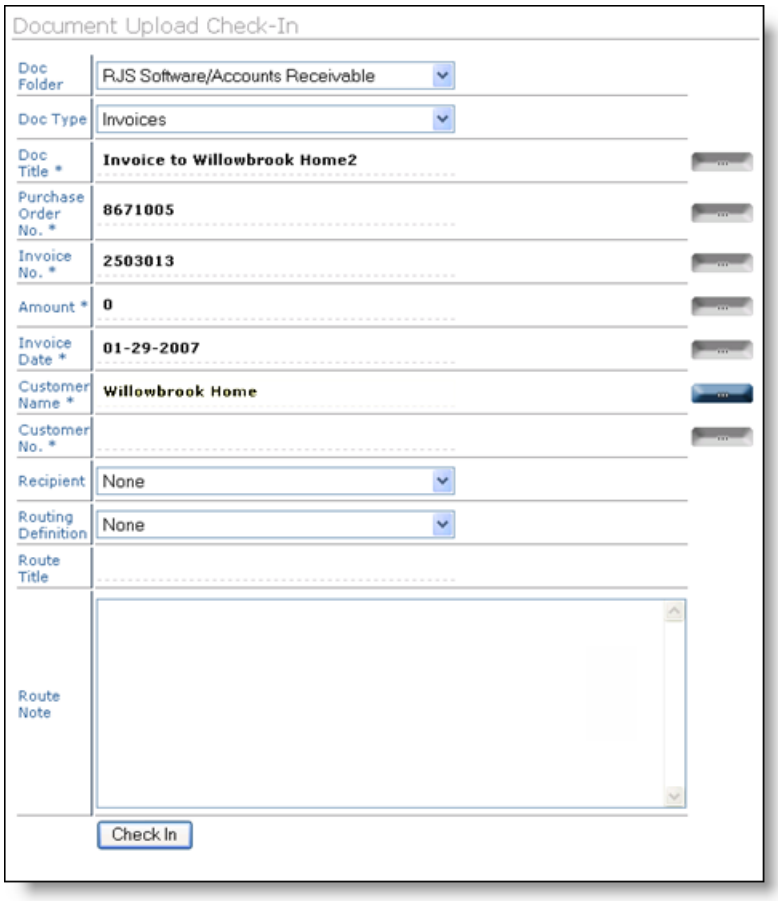

The value you selected in the Custom Lookup popup is filled in

While this example is relatively simple, Custom Lookups can be far more complex. It depends on how they were set up. Contact your system administrator for more information.

Searching in a Custom Lookup window

If there are a large number of selections, searching in a Custom Lookup window is often easier than scrolling. Searching is also useful if you can remember part of a value, but not enough to find it. For example, if you knew that a company name included the phrase "and Sons" but you couldn't remember the first part of the company name, you could search for "and Sons."

There is a Search field for each column in a Custom Lookup window. You can search by either column.

To search within a Custom Lookup window:

1. In the Custom Lookup popup, enter search criteria in a Search field. Use an asterisk (*) or the percentage sign (%) as an wildcard character. Use an underscore (_) or a question mark (?) as a wildcard character that limits the search to a single character. Refer to the Wildcard Search Example 43 for more information on wildcards.

   In this example, we will search for all customer names that start with "Will," so enter ***Will%***.

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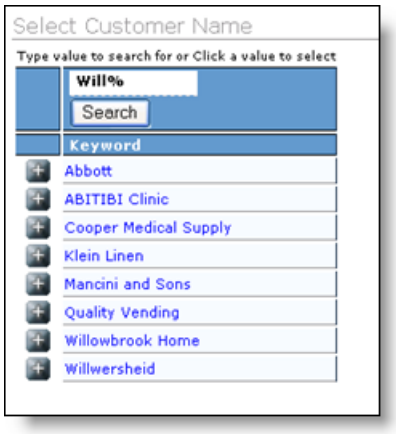
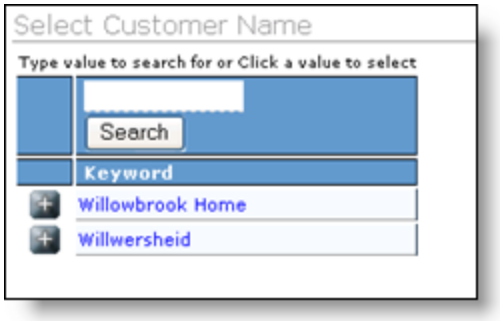


Example using wildcard (%)

2. Click the **Search** button in the Custom Lookup popup.

   All lines that match the search criteria display. In this example, two Customer Names match the search criteria.



Search results

Moving Documents Between Folders

Occasionally you may need to move a document to a different Folder. Perhaps the document was uploaded incorrectly, or maybe there is a new Folder and you need to move an existing document to the new Folder.

To move a document:

1. Display the Document Details window for the document that you want to move.

   In this example, we will move the document below from the Memos Folder to the Accounts Receivable Folder.

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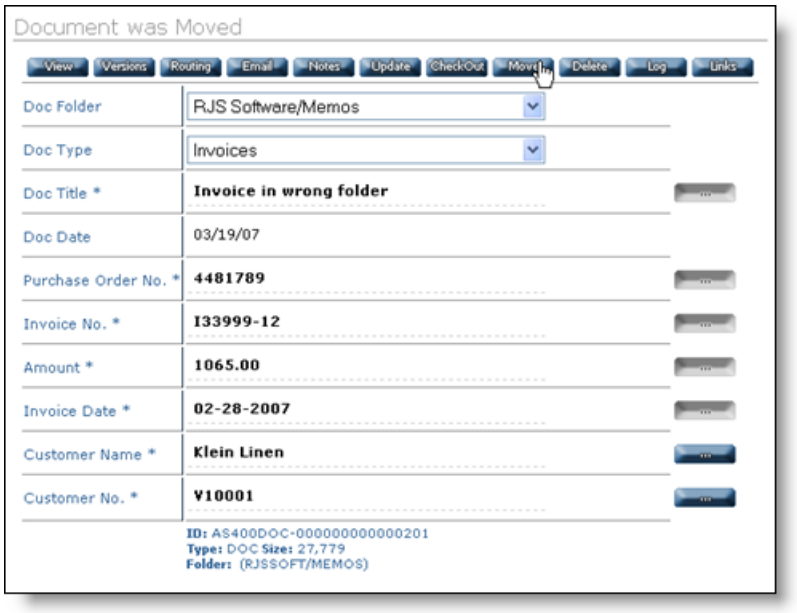
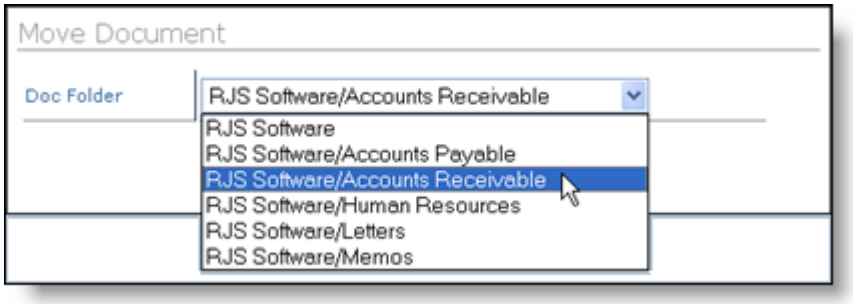


Document Details for the document to be moved

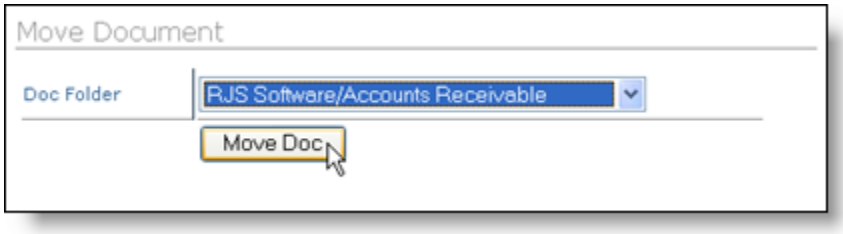
2. Click the **Move** button.

   The Move Document window displays.

3. Click the **Doc Folder** drop-down list and select the new Folder for this document.



4. Click the **Move Doc** button.



   The document is moved to the newly identified Folder. The Document Details window displays the message "Document was Moved."

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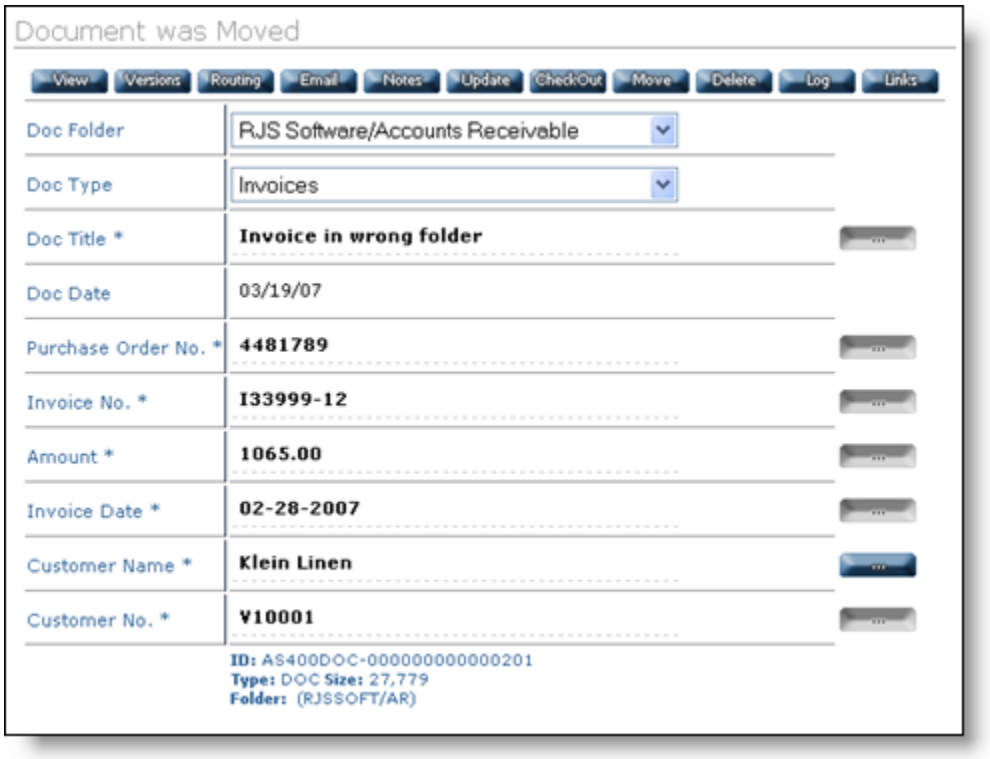

Deleting Documents

Deleting documents from WebDocs is a relatively simple process, but as always, make sure you do not inadvertently delete the wrong document.

If the Delete button does not display, you do not have access rights to this feature. Contact your system administrator for more information.

Note: Deleted documents are not entirely removed from WebDocs. They are moved to the Deleted Documents Folder. This is a system Folder that some users (typically system administrators) can access. It is similar to the Recycle Bin in Windows. Contact your system administrator if you need to restore a deleted document or if you want to physically delete the document from WebDocs.

To delete documents:

1. Display the "Document Details" window for the document that you want to delete.

   In this example, we will delete the document titled "Document to Delete."

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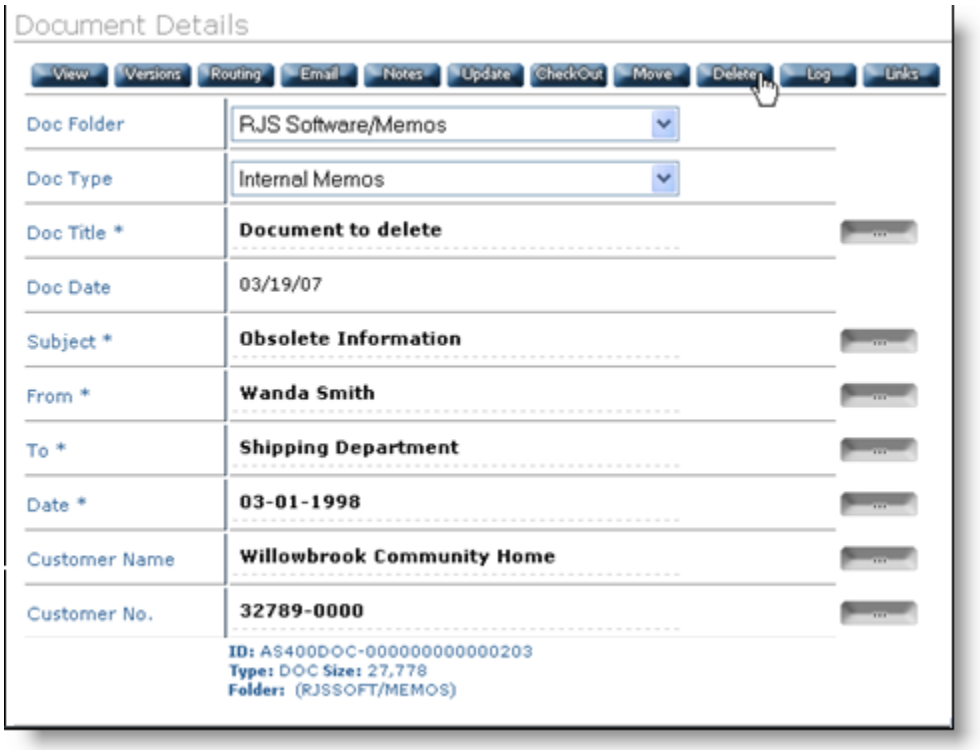
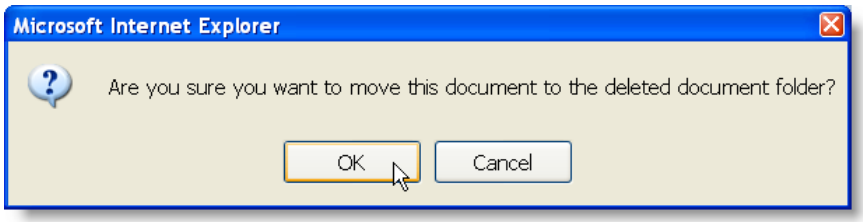


Display Document Details for the document to delete

2. Click the **Delete** button.

   This message displays:



3. Click the **OK** button.

   This message displays:

   The document is deleted from the current Folder. It is moved to the Deleted Documents Folder. Contact your system administrator to restore a deleted document.

Viewing the Audit Log

If the system administrator has enabled auditing at your company and given you permission to do

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so, you can view the Audit Log for a document.

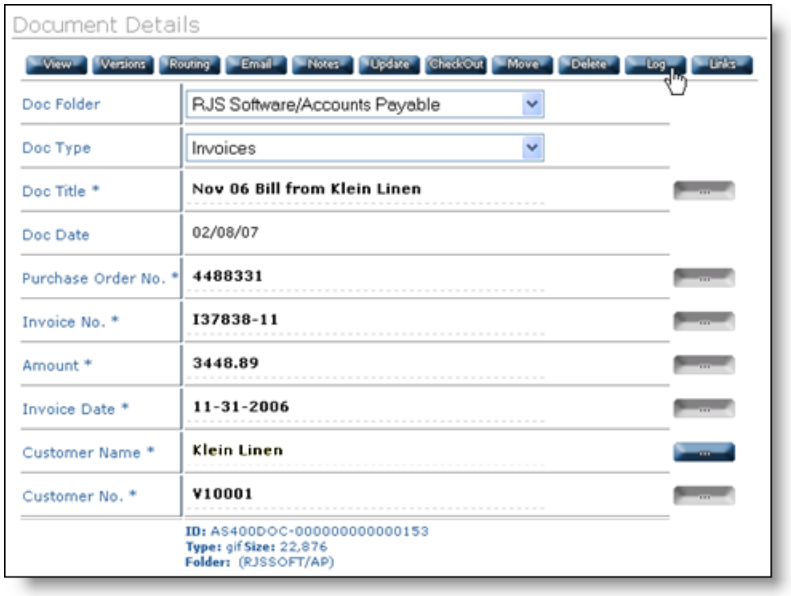
The Audit Log contains records for any activity associated with a Document. Any time a user views the document, checks it out, checks it in, modifies it, emails it, etc., a record is written to the Audit Log. This log provides a thorough audit trail of all activity for a document including users who just view a document.

If the Log button does not display, you do not have access rights to this feature. Contact your system administrator for more information.

To view the Audit Log for a document:

1. Display the "Document Details" window for a document.

   In this example, we will look at the Audit Log for the document "Nov 06 Bill from Klein Linen."



Click the Log button on the Document Details window

2. Click the **Log** button.

   The "Document Audit Log" window displays.

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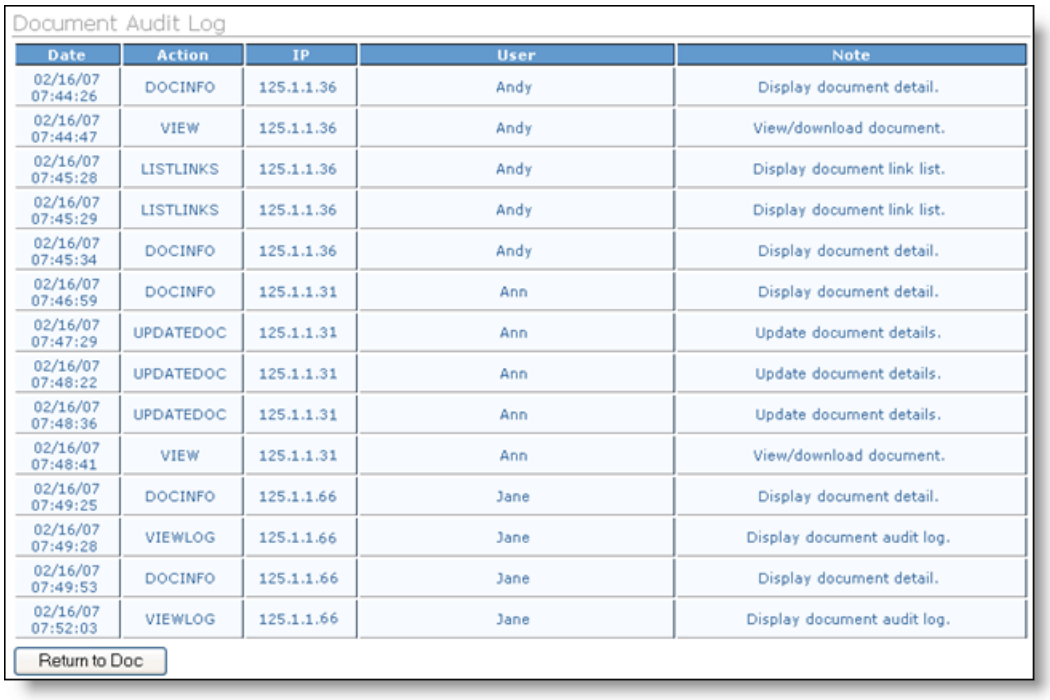

Document Audit Log

Date	Action	IP	User	Note
02/16/07 07:44:26	DOCINFO	125.1.1.36	Andy	Display document detail.
02/16/07 07:44:47	VIEW	125.1.1.36	Andy	View/download document.
02/16/07 07:45:28	LISTLINKS	125.1.1.36	Andy	Display document link list.
02/16/07 07:45:29	LISTLINKS	125.1.1.36	Andy	Display document link list.
02/16/07 07:45:34	DOCINFO	125.1.1.36	Andy	Display document detail.
02/16/07 07:46:59	DOCINFO	125.1.1.31	Ann	Display document detail.
02/16/07 07:47:29	UPDATEDOC	125.1.1.31	Ann	Update document details.
02/16/07 07:48:22	UPDATEDOC	125.1.1.31	Ann	Update document details.
02/16/07 07:48:36	UPDATEDOC	125.1.1.31	Ann	Update document details.
02/16/07 07:48:41	VIEW	125.1.1.31	Ann	View/download document.
02/16/07 07:49:25	DOCINFO	125.1.1.66	Jane	Display document detail.
02/16/07 07:49:28	VIEWLOG	125.1.1.66	Jane	Display document audit log.
02/16/07 07:49:53	DOCINFO	125.1.1.66	Jane	Display document detail.
02/16/07 07:52:03	VIEWLOG	125.1.1.66	Jane	Display document audit log.

Return to Doc

Audit Log for the document Nov. 06 Bill from Klein Linen

The Audit Log displays all actions relative to this document, including which users took the actions and the IP address of the computers they used.

3. Click the **Return to Doc** button.

   The "Document Audit Log" window closes and the Document Details window displays again.

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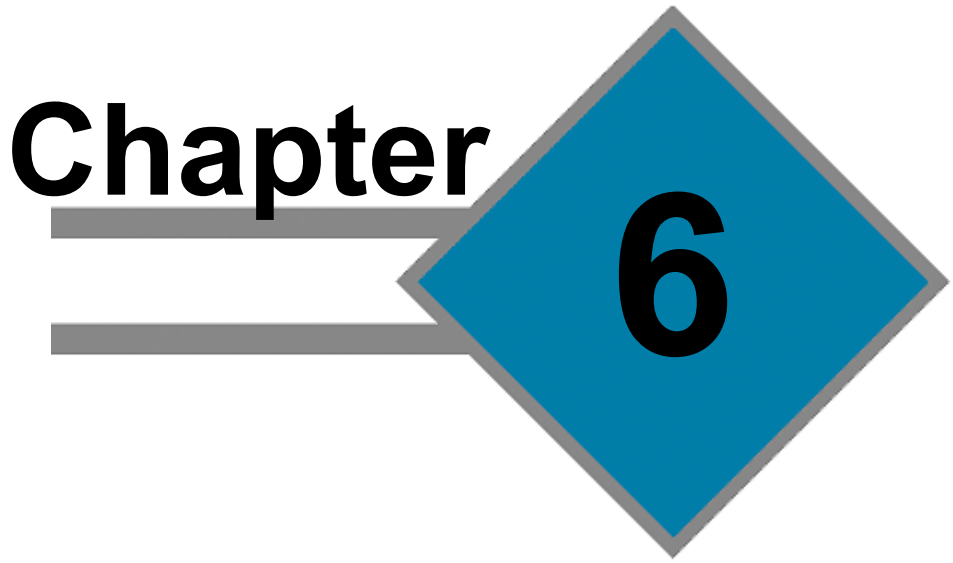

Working with Document Versions

Working with Document Versions

WebDocs allows you to store multiple versions of the same document. This means that you can always view, and if necessary restore, an earlier version of a document.

This chapter includes the following topics:

Checking Out, Revising, and Checking In Documents 84

Checking In Documents from RJS Document Imaging Viewer 91

Viewing Previous Versions of Documents 92

Checking Out, Revising, and Checking In Documents

WebDocs allows you to store multiple versions of a document. This topic covers checking out a document, revising it 86, and checking it back in 86.

If your company has purchased RJS Document Imaging Viewer, you can check documents out in WebDocs, open them in the RJS Document Imaging Viewer, and then check them back in directly from the Viewer. For more information, refer to Checking In Documents from the RJS Document Imaging 91 Viewer.

If your company uses the Microsoft Office Add-In, you can check documents out and then back in directly from Microsoft Word or Excel. Refer to Checking Documents Out from Word or Excel 105 and Checking Documents In from Word or Excel 107.

Checking Out Documents

Only one user can check out a document at a time. While more than one person can view a document, only one person can have update rights to it at a time.

To check out a document:

1. Display the "Document Details" window for the document you want to check out.

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Checking out a document

2. Click the **Checkout** button.

   The document is now checked out. The "Document Details" window displays again with a reduced set of buttons.

If you see the CheckIn button, you know the document is checked out

With the document checked out, you "own" the document. No other users can modify it.

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To cancel the check out, click the **Undo** button.

Most of the time users check out documents to revise them. Occasionally, instead of revising the document, you may want to check in another document in place of the original one. You may want to do this if you uploaded the wrong document initially, or if you need to replace the document for any other reason.

To replace the original document instead of revising it, go directly to the section below checking in documents.

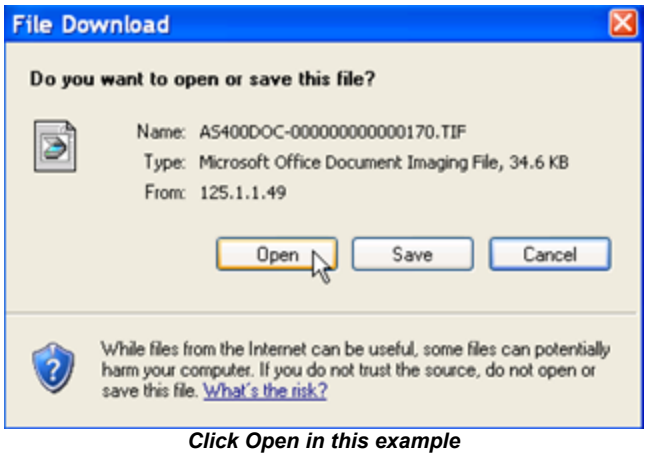
Revising Documents

Once you have checked out a document, open and modify it within the application associated with that file type.

To revise a checked out document:

1. With the document checked out, click the **View** button on the "Document Details" window.

   The "File Download" window displays.


File Download
Do you want to open or save this file?
Name: AS400DOC-000000000000170.TIF
Type: Microsoft Office Document Imaging File, 34.6 KB
From: 125.1.1.49
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Click Open in this example

2. Click the **Open** button. The document opens in the default application for that file type. In this example, we opened a .TIF file. It is an internal memo about packaging problems.

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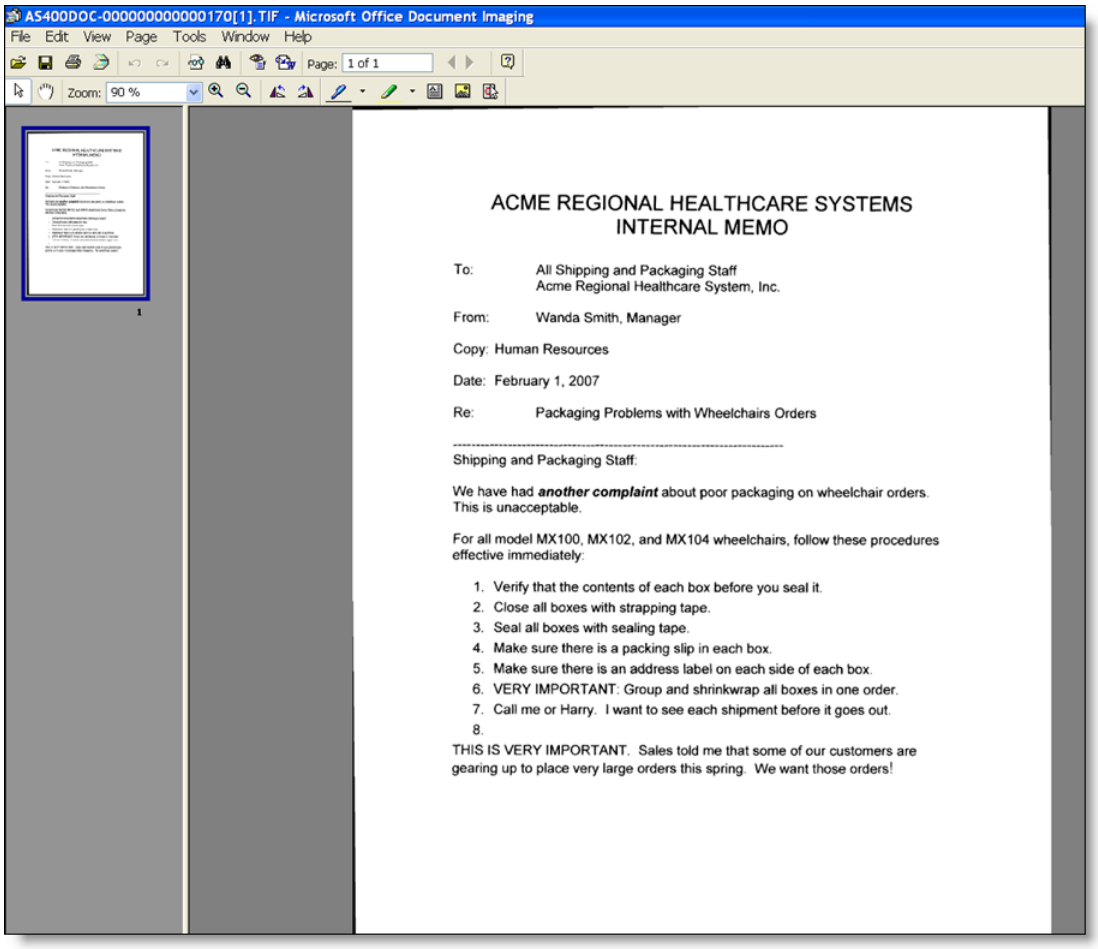
AS400DOC-000000000000170[1].TIF - Microsoft Office Document Imaging
File Edit View Page Tools Window Help
Page: 1 of 1
Zoom: 90 %
ACME REGIONAL HEALTHCARE SYSTEMS
INTERNAL MEMO
To: All Shipping and Packaging Staff
Acme Regional Healthcare System, Inc.
From: Wanda Smith, Manager
Copy: Human Resources
Date: February 1, 2007
Re: Packaging Problems with Wheelchairs Orders
Shipping and Packaging Staff:
We have had another complaint about poor packaging on wheelchair orders. This is unacceptable.
For all model MX100, MX102, and MX104 wheelchairs, follow these procedures effective immediately:
1. Verify that the contents of each box before you seal it.
2. Close all boxes with strapping tape.
3. Seal all boxes with sealing tape.
4. Make sure there is a packing slip in each box.
5. Make sure there is an address label on each side of each box.
6. VERY IMPORTANT: Group and shrinkwrap all boxes in one order.
7. Call me or Harry. I want to see each shipment before it goes out.
8.
THIS IS VERY IMPORTANT. Sales told me that some of our customers are gearing up to place very large orders this spring. We want those orders!

The .TIF opens in the default application on this PC (Microsoft Office Document Imaging)

Note: If the document opens in an application other than the one you expected, contact your system administrator. This is set on your PC.

3. Revise the document.

   In this example, we added a yellow box with some text in it at the bottom of the document.

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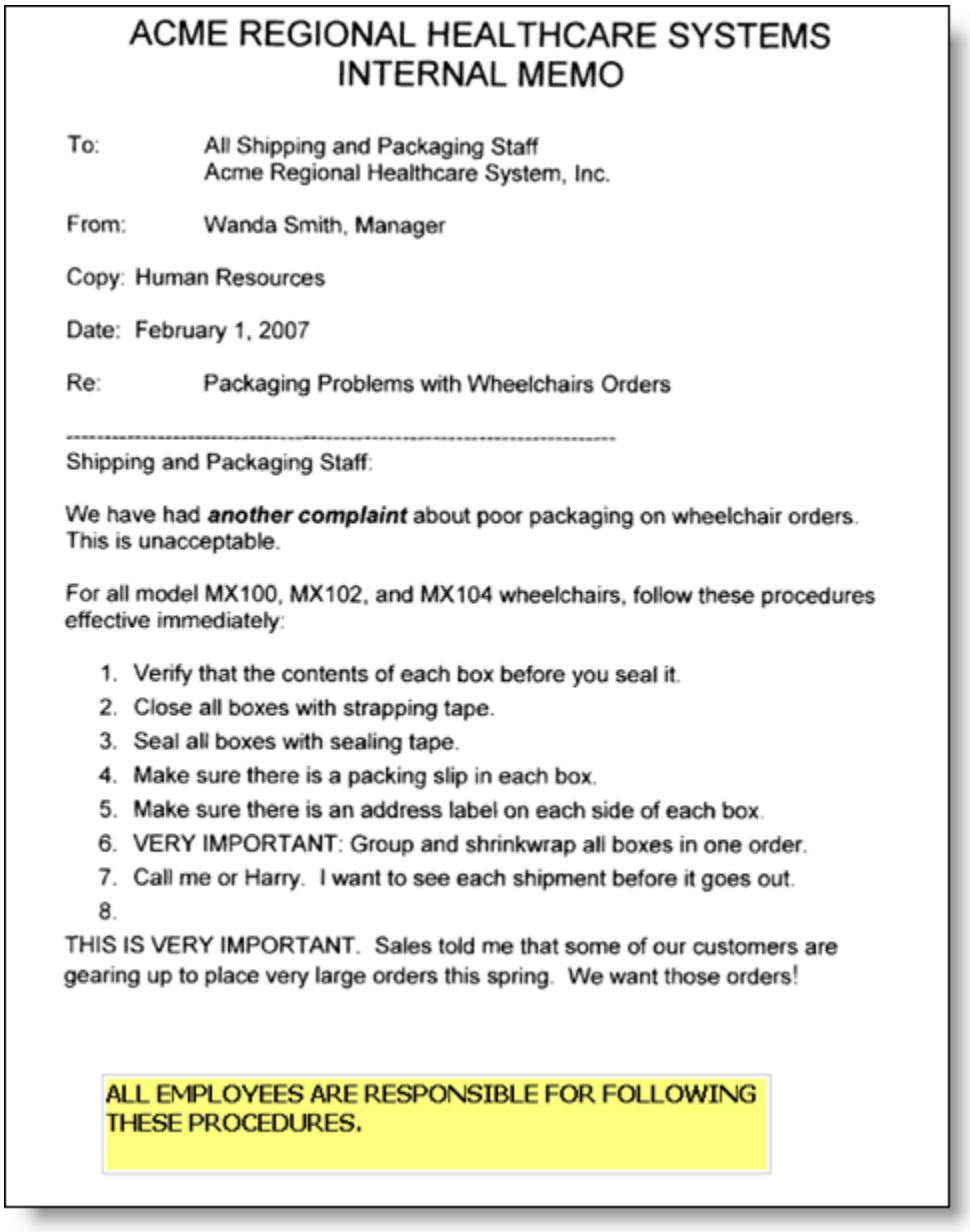

ACME REGIONAL HEALTHCARE SYSTEMS
INTERNAL MEMO

To: All Shipping and Packaging Staff
Acme Regional Healthcare System, Inc.

From: Wanda Smith, Manager

Copy: Human Resources

Date: February 1, 2007

Re: Packaging Problems with Wheelchairs Orders

Shipping and Packaging Staff:

We have had ***another complaint*** about poor packaging on wheelchair orders. This is unacceptable.

For all model MX100, MX102, and MX104 wheelchairs, follow these procedures effective immediately:

1. Verify that the contents of each box before you seal it.
2. Close all boxes with strapping tape.
3. Seal all boxes with sealing tape.
4. Make sure there is a packing slip in each box.
5. Make sure there is an address label on each side of each box.
6. VERY IMPORTANT: Group and shrinkwrap all boxes in one order.
7. Call me or Harry. I want to see each shipment before it goes out.
8.

THIS IS VERY IMPORTANT. Sales told me that some of our customers are gearing up to place very large orders this spring. We want those orders!

ALL EMPLOYEES ARE RESPONSIBLE FOR FOLLOWING THESE PROCEDURES.

4. Use the **File > Save as** command in your application (or a similar one) to save the document to your desktop or to a path and a filename that you can remember. When you check in the document, you will need to remember where you saved it. (The RJS Viewer does not have this requirement.)

   Note: If you use the File > Save instead of File > Save as command, the document will be saved to a temporary Folder with a cryptic filename. We recommend using File > Save as so that you can find the file again easily.

Checking In Documents

When you have made and saved your changes to the document (or replaced the document with another document), check the document back in.

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Note: If your company uses the RJS Document Imaging Viewer or the RJS Microsoft Office Add-Ins, you can also check in documents directly from the RJS Document Imaging Viewer or Microsoft Word, Excel, or Outlook. Refer to Checking in Documents from RJS Document Imaging Viewer or Checking in Documents from Microsoft Applications for more information.

To check in a document from WebDocs:

1. From the "Document Details" window in WebDocs, click the **CheckIn** button.

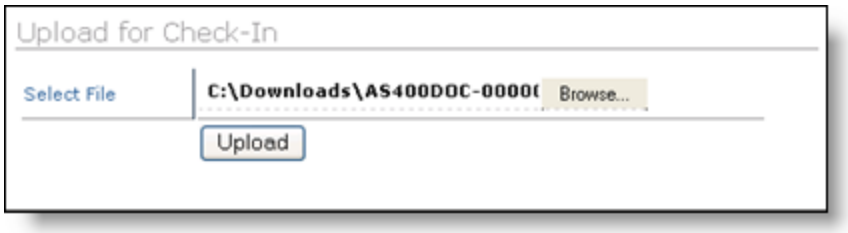
   Note: If you do not see a CheckIn button, the document was not checked out.

Checking in a document

   The "Upload for Check-In" window displays.

2. Click the **Browse** button and identify the document to upload. (This is why you need to remember where you saved the document.)

   Note: At this point, technically, you could upload any document to "replace" the one you downloaded.



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3. When you have identified the document to check in, click the **Upload** button.

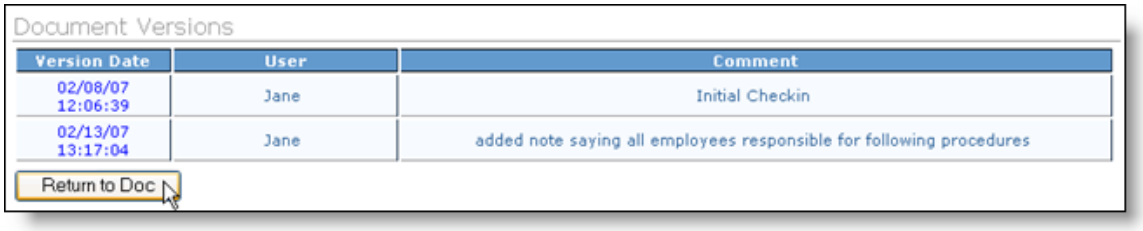
   The "Check-In Document Change" window displays.

4. Enter comments that summarize the changes you made to this document. Enter information that will be meaningful to you and to your colleagues. These comments display in the Versions window.

   Note: Once you add Comments, you cannot revise or delete them.

5. Click the **Checkin Changes** button.

   The "Document Versions" window displays again showing the comments you just added for the document you are checking in.



   Note: For information on viewing earlier versions of this document, refer to Viewing Previous Versions of Documents 92.

6. Click the **Return to Doc** button.

   The document is checked back in and the "Document Details" window displays.

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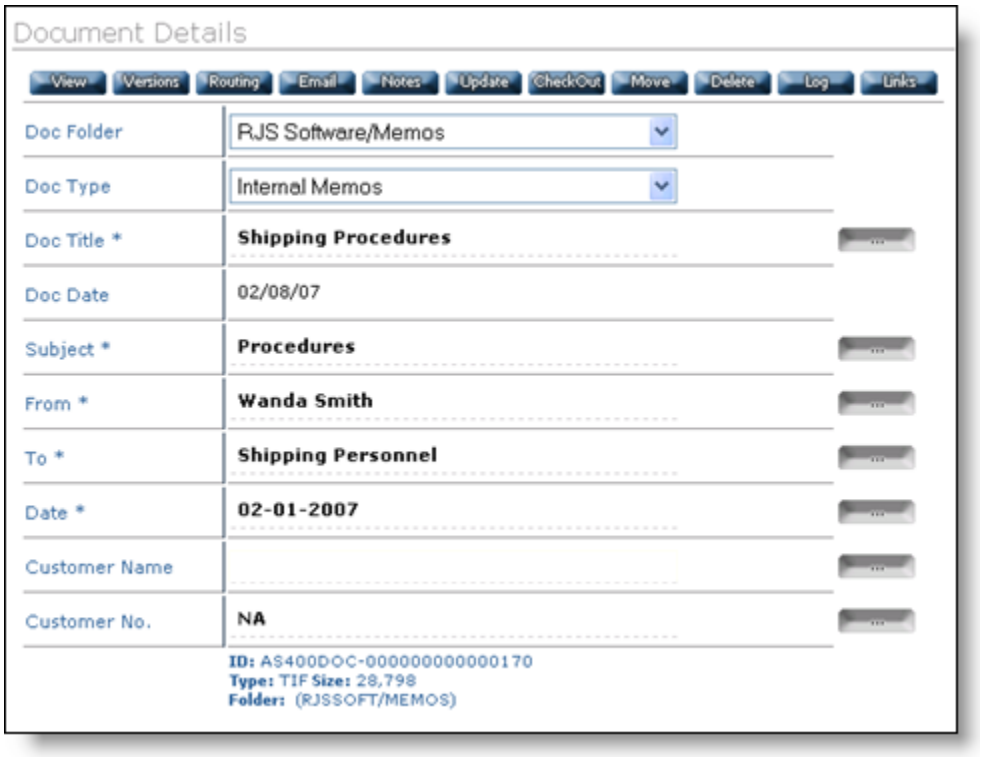

The document is checked back in

Checking In Documents from RJS Document Imaging Viewer

The RJS Document Imaging client software is an optional custom image viewing product for viewing documents stored via the WebDocs software. The advantage to using the RJS Document Imaging Viewer instead of another application is that you can check in documents right from the Viewer.

The imaging client can be used to view TIF, JPG, BMP, MODCA and other image formats.

The software can also be used to append scanned images to an existing document that has been checked out via WebDocs.

To check in a document:

1. If you are viewing a document that has been checked out, click the **Check-In** button on the RJS Document Imaging Viewer toolbar.

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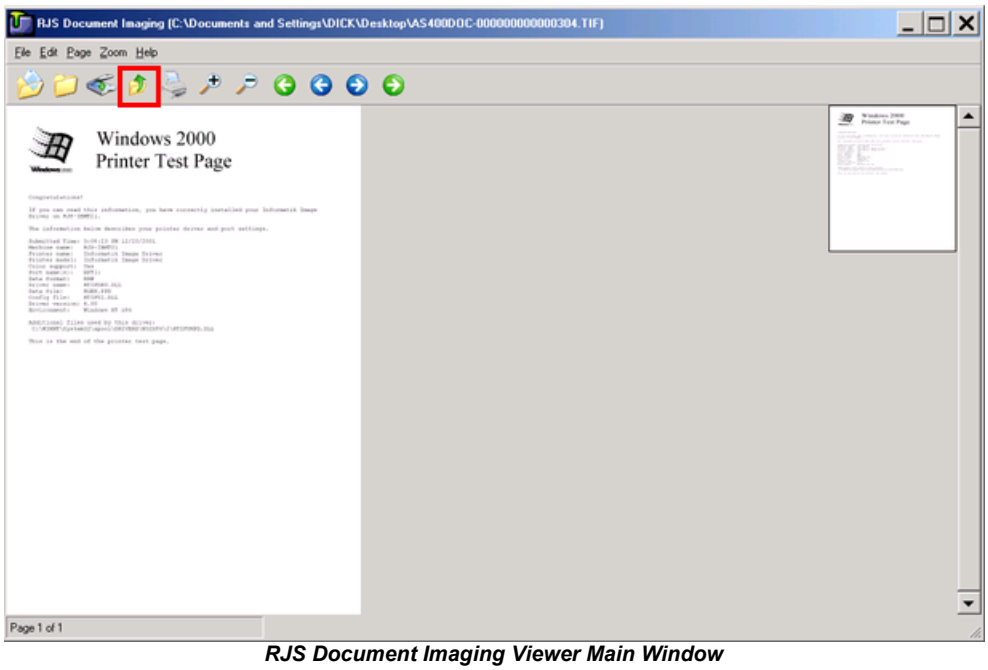
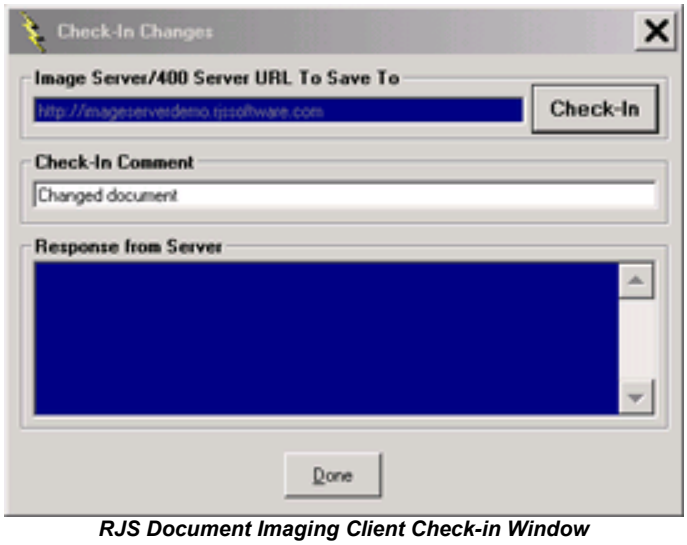

RJS Document Imaging (C:\Documents and Settings\DICK\Desktop\AS400DOC-00000000000304.TIF)
File Edit Page Zoom Help
Windows 2000
Printer Test Page
Page 1 of 1

RJS Document Imaging Viewer Main Window

The "Check-In Changes" window displays:



RJS Document Imaging Client Check-in Window

2. Enter a comment in the **Check-In Comment** field.
3. Click the **Check-In** button.

   The document, with any changes you have made, is checked in to WebDocs.

Viewing Previous Versions of Documents

Any time a document is checked out of WebDocs, a version of it is saved. This means that you can go back and view previous versions of the same document.

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If you are not familiar with how to check documents out and then back in WebDocs, refer to Checking Out, Revising, and Checking In Documents 84.

To view previous versions:

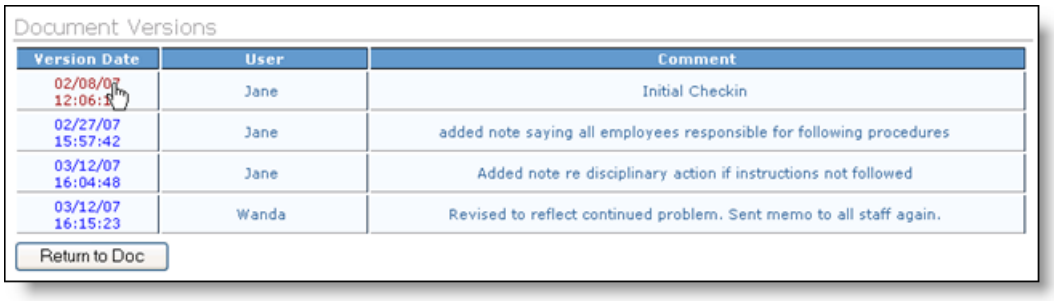
1. Display the "Document Details" window for the document for which you want to see previous versions.

   In this example, we will look at a previous version of a memo about shipping procedures.

Document Details window for the memo Shipping Procedures

2. Click the **Versions** button.

   The Document Versions window displays. It shows all previous versions of this document. Looking at this, we can see that the original document was uploaded on February 8. This document was revised three times after that, most recently on March 12 by the user Wanda.



The Versions screen displays all previously checked out versions of this document

Note: If the document was checked out and back in directly from Microsoft Word or Excel using the Microsoft Office Add-In optional component, the Comments field will be blank.

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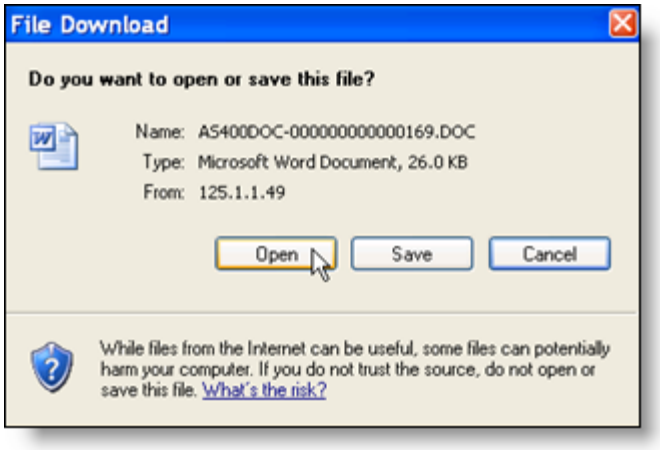
3. Click on the Version Date of the version you want to open.

   The "File Download" window displays.


File Download
Do you want to open or save this file?
Name: AS400DOC-000000000000169.DOC
Type: Microsoft Word Document, 26.0 KB
From: 125.1.1.49
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

The File Download window

4. Click **Open** to view that version of the document.

   The document opens in the application associated with that file type.

Restoring a Previous Version of a Document

You can *view* any previous version of a document at any time. You can also manually restore an earlier version of a document.

To "restore" an earlier version of a document:

1. Check out the latest version of the document.
2. Save the document.
3. Open the previous version that you want to restore.
4. Save the previous version to the same document name as the one you checked out, i.e., save it "over" the most recent version.
5. Check the document back in.

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Chapter 7

Working with Microsoft Office Add-Ins

Working with Microsoft Office Add-Ins

If your company uses the RJS Microsoft Office Add-In component, you can perform several WebDocs functions within Microsoft Word, Excel, or Outlook. This component installs a convenient WebDocs iSeries menu right in your Microsoft applications.

This chapter includes the following topics:

Microsoft Office Add-In Menu Options 96

Uploading Documents to WebDocs from Word, Excel, or Outlook 97

Opening and Checking Out Documents from Word or Excel 102

Checking Out Open Documents from Word or Excel 105

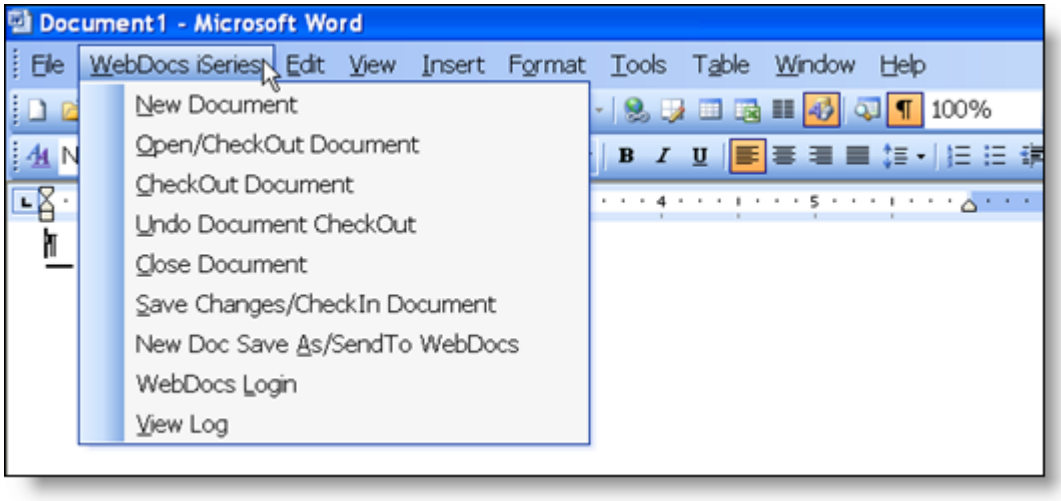
Checking In Documents from Word, Excel, or Outlook 107

Undoing Document Checkout from Word or Excel 108

Microsoft Office Add-In Menu Options

If your company uses the Microsoft Office Add-In, the WebDocs iSeries menu option is added to Microsoft Word, Excel, and Outlook.

When you click on the WebDocs iSeries menu, these menu options display:



The Microsoft Word WebDocs iSeries menu options

Note: In Microsoft Outlook, the WebDocs iSeries menu only has one option: New Doc Save As/Send to WebDocs.

The options in the WebDocs iSeries menu are:

- **New Document** - Create a new document. This is the same as File > New.

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- **Open/Checkout Document** - Opens a WebDocs search window in which you can identify the document to open and check out.
- **CheckOut Document** - Checks out a document that you had opened from WebDocs but that you have not already checked out.
- **Undo Document CheckOut** - Cancels the checkout of a document without saving your changes.
- **Close Document** - Closes the local copy of a Word or Excel document without checking it in or out. This is the same as File > Close.
- **Save Changes/CheckIn Document** - Checks in a document that was previously checked out.
- **New Doc Save As/Send To WebDocs** - Saves a newly created document to WebDocs.
- **WebDocs Login** - Opens the WebDocs Login window so that you can log in to WebDocs.
- **View Log** - This option is reserved for future use. It will be used to view a log list of WebDocs URL's for troubleshooting. These URL's will be captured if a log option is enabled on the login screen.

Uploading Documents to WebDocs from Word, Excel, or Outlook

If your company uses the WebDocs Microsoft Add-In, you can upload new documents directly from Microsoft Word, Excel, or Outlook. By new documents, we mean documents that are not already in WebDocs.

Note: If you have used the Microsoft Office Add-In to check a document out of WebDocs, and now you want to check it back into WebDocs, refer to Checking in Documents from Word, Excel, or Outlook 107.

To upload a new document (that is not already in WebDocs) from Word, Excel, or Outlook:

1. Create or open a your document in Word, Excel, or Outlook. Work with it (revise it, format it, add to it, etc.) just as you would any document.

   Note: The examples in this topic are from Microsoft Word. The process is the same for Microsoft Excel and Microsoft Outlook documents.

2. When you are ready to upload the document to WebDocs, click the **New Doc Save As/SendTo WebDocs** option from the WebDocs iSeries menu.

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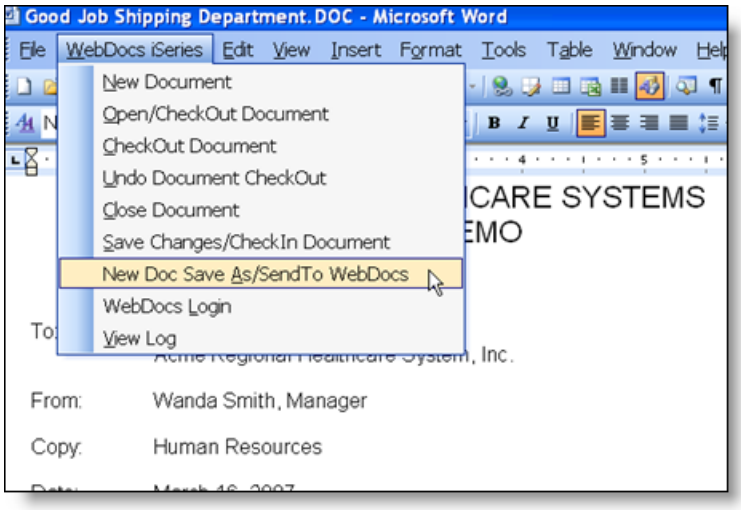
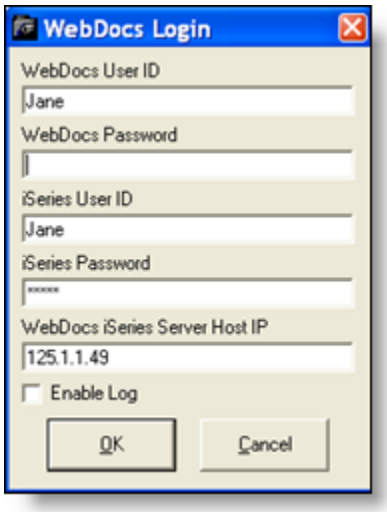


Click this menu option to upload a document to WebDocs.

The WebDocs Login window displays.



Enter all Login information

3. Enter your WebDocs User ID and Password, your iSeries User ID and your iSeries password, and your WebDocs iSeries Server Host IP. Click the **OK** button.

   Enter your WebDocs and iSeries Passwords every time you log in using this window. This information is not saved.

   Note: If you do not have an iSeries User ID and an iSeries Password, or you do not know your WebDocs iSeries Server Host IP, contact your system administrator.

   The document closes and the Enter Document Keyword Info window displays. It contains the same information as the WebDocs Document Details window. If you are not familiar with the Document Details window, refer to Uploading Documents Manually 19.

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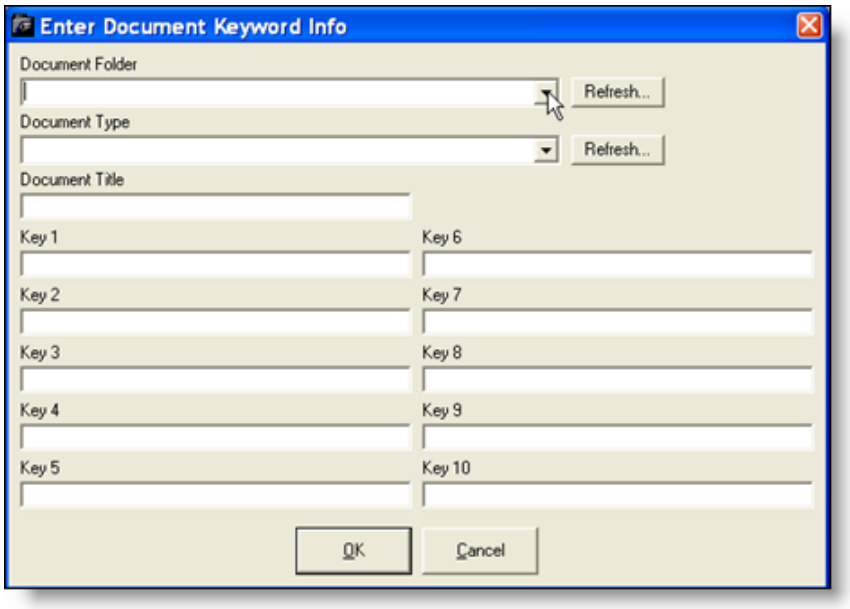
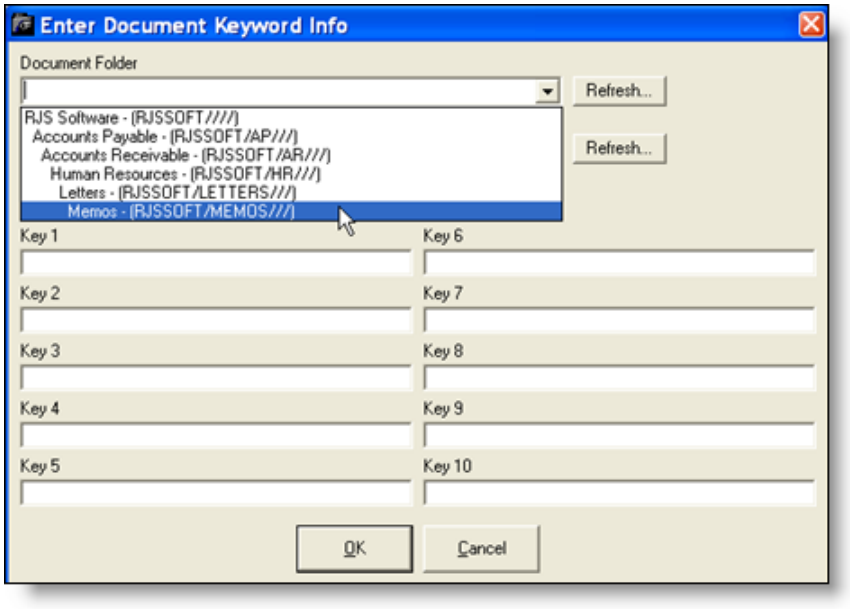


The Enter Document Keyword Info screen

4. Click the **Document Folder** drop-down list and select the WebDocs Folder in which you would like to place this document.

   In this example, we will select the **Memos** Folder.

   Note: Click the **Refresh...** button to get the most current list of Folders from the iSeries.



The WebDocs Folders that you can access display

5. Click the **Document Type** drop-down list and select the Document Type for this document.

   In this example, we will select **Internal Memos**.

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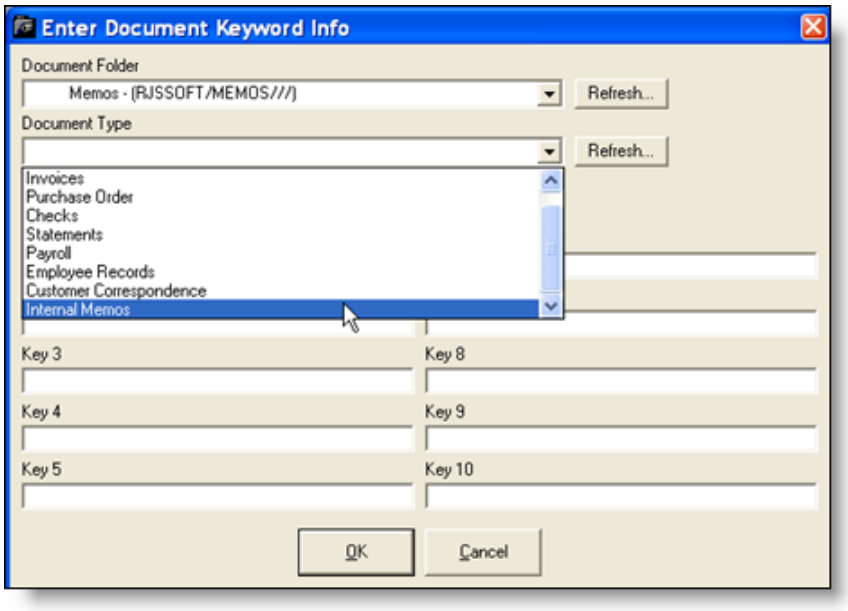
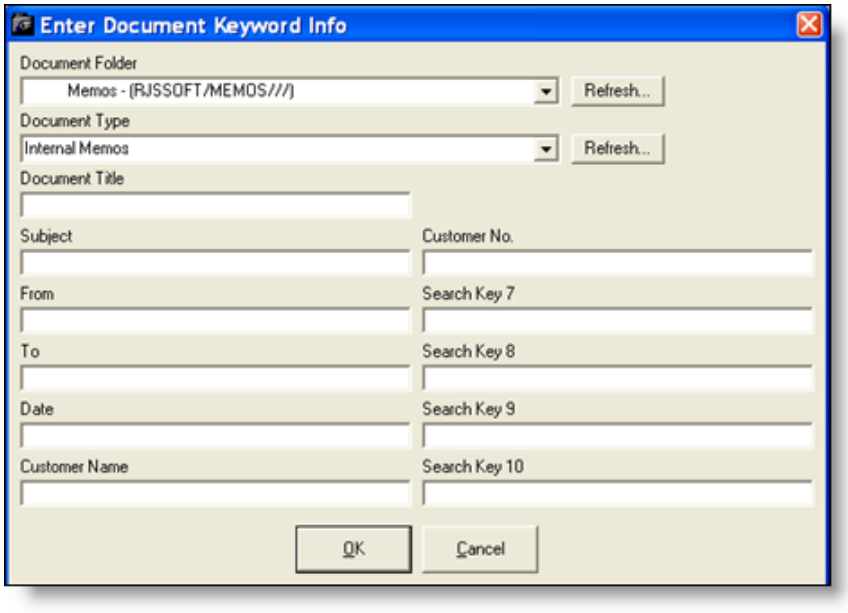


The WebDocs Document Types that you can use display

When you select the Document Type, the Search Keys associated with that Document Type display.



The Search Keys for Internal Memos display

6. Enter a Document Title.

   In this example we will enter ***Good Job Shipping Department***.

7. Enter information in all of the Document Key fields and then click **OK**.

   Note: Follow your company's guidelines for entering this information. Enter all fields using the correct formatting for that type of field (character, numeric, date, etc.).

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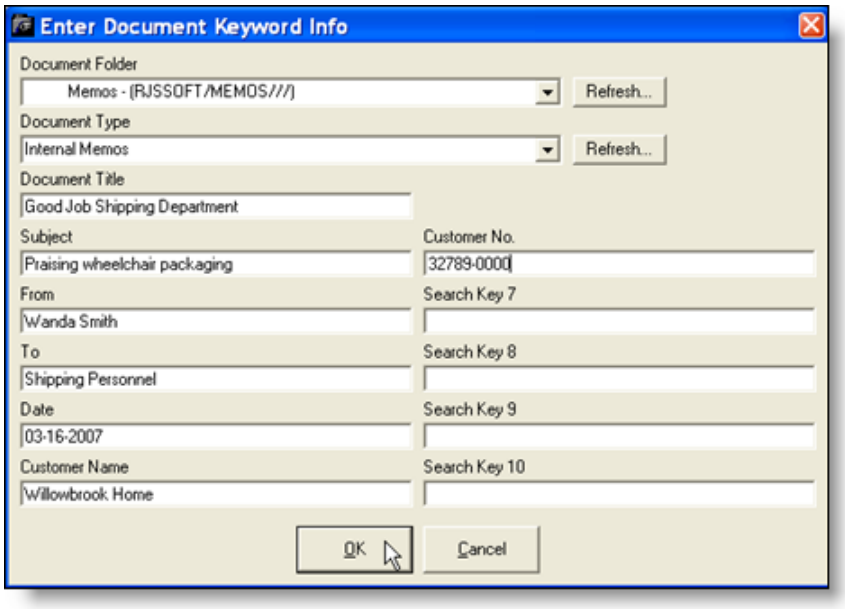
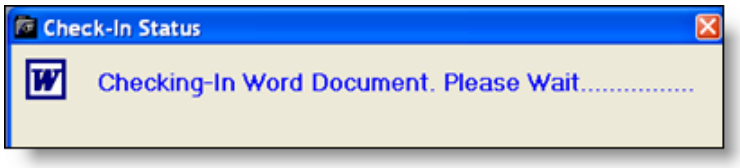
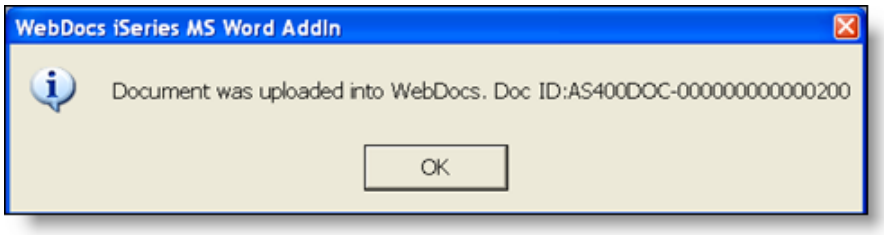


When you have entered all Search Key fields, click OK

The Check-In Status message window displays.



When the upload is complete, this message window displays.



8. Click the **OK** button.

   The message window closes. The document is uploaded.

If you log in to WebDocs, you can see that the document has uploaded. Here is the Document List for the Folder Memos.

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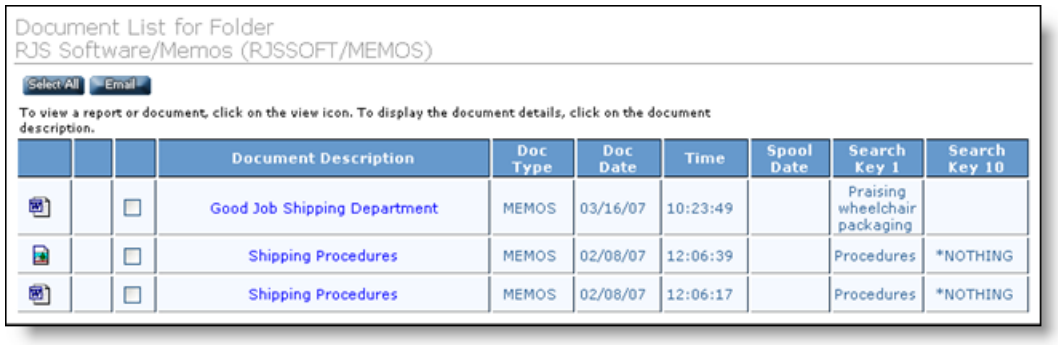
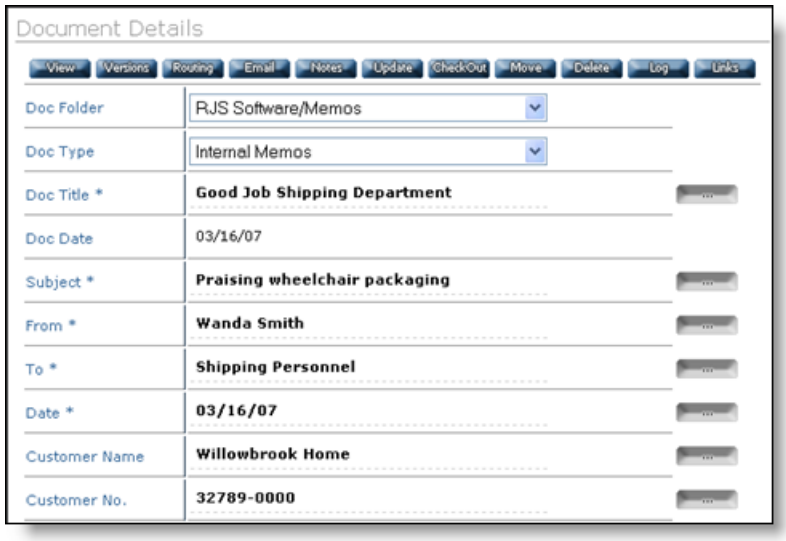


Document List for the Folder Memos

If you click on the Document Description for the newly uploaded document "Good Job Shipping Department," the Document Details window displays. Documents uploaded via the Microsoft Office Add-Ins look the same as if you uploaded them manually or via another method.



Opening and Checking Out Documents from Word or Excel

If your company uses the WebDocs Microsoft Add-In, you can check documents out of WebDocs directly from Microsoft Word or Excel without starting WebDocs. Typically, you would check documents out, modify and revise them, and then check the documents back in to WebDocs.

When you check out a document:

- The document is saved to a temporary directory named webdocstemp on your hard drive. It remains in this temporary directory until you check it back in.
- In WebDocs, the Document Details window indicates that the document is checked out. While the document is checked out, other users cannot check it out. They can still view the document as it was before it was checked out.

This topic covers checking documents out of WebDocs from Word or Excel. For information about checking the documents back in, refer to Checking in Documents from Word or Excel 107.

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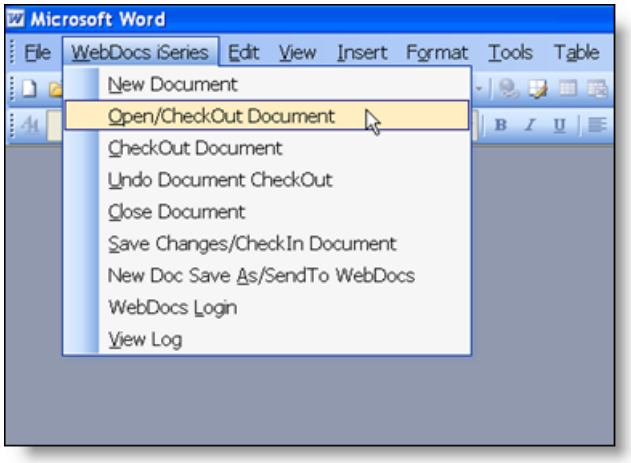
To check out a document (that is already in WebDocs) from Word or Excel:

1. If it is not already started, start the Microsoft application in which you want to work. In this example, we will use Microsoft Word. The process is identical for Microsoft Excel.

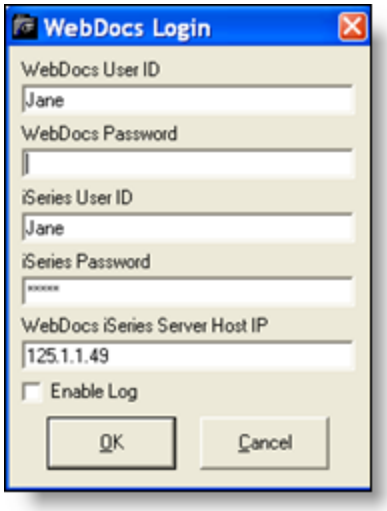
2. Click the **Open/CheckOut Document** command from the WebDocs iSeries menu.

   Note: To check out a document that is already open, refer to Checking Out Open Documents from Word or Excel 105.



Click this menu option to check out a document that is not already open

The WebDocs Login window displays.



Enter all Login information

3. Enter your WebDocs User ID and Password, your iSeries User ID and Password, and your WebDocs iSeries Server Host IP. Click the **OK** button.

   Enter your WebDocs and iSeries Passwords every time you log in using this window. This information is not saved.

   Note: If you do not have an iSeries User ID and an iSeries Password, or you do not know your

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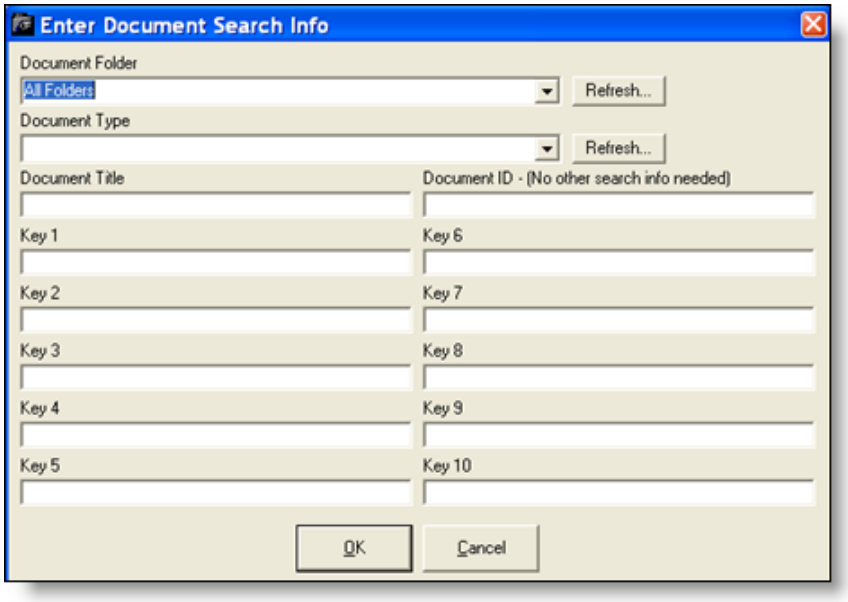
WebDocs iSeries Server Host IP, contact your system administrator.

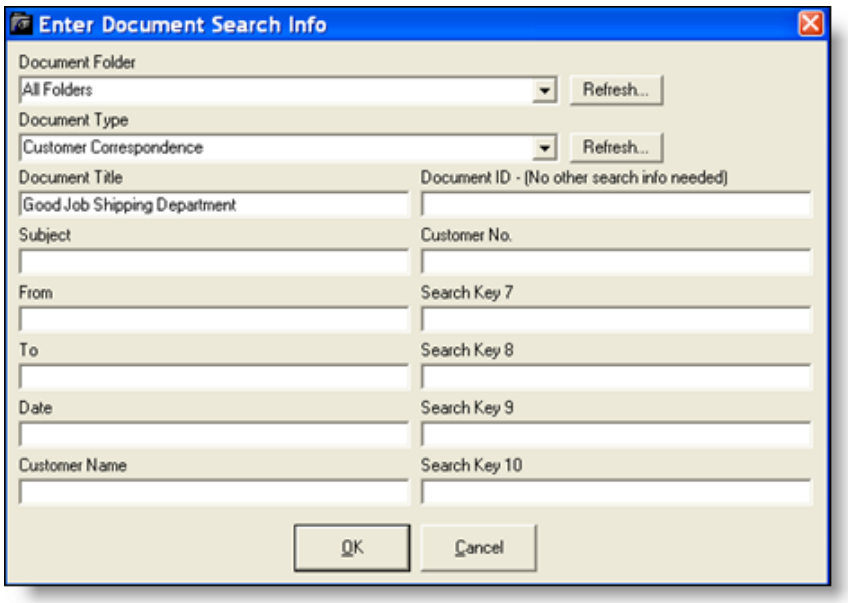
The "Enter Document Search" Info window displays.



Use this screen to enter search criteria

4. Enter search criteria to identify the document that you want to check out and click the **OK** button. Enter as much or as little search criteria as you need to identify the document.

   In this example, we will check out the document with the Document Type of Customer Correspondence and the Document Title "Good Job Shipping Department."



Identify the document by entering the Document Type and the Document Title

If you have entered search criteria that matches only one document, when you click OK, the document is checked out and it opens.

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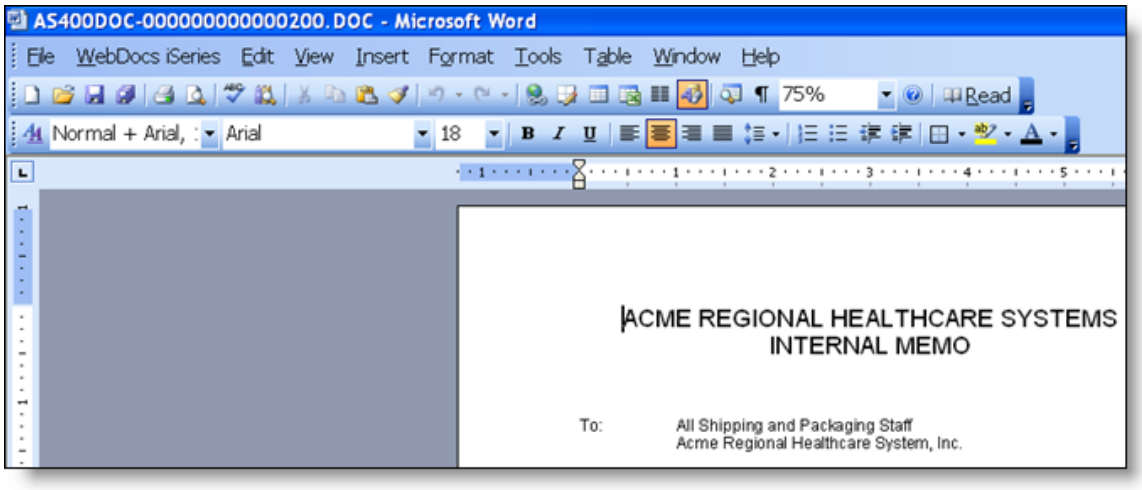
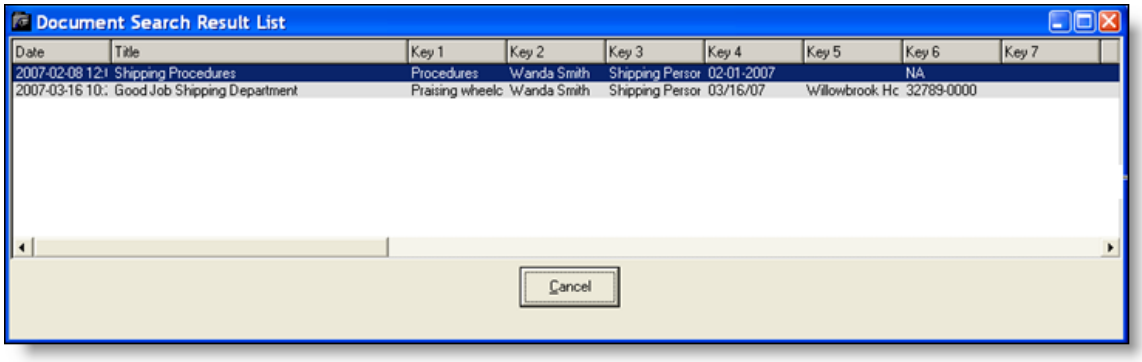

AS400DOC-0000000000000200.DOC - Microsoft Word
File WebDocs iSeries Edit View Insert Format Tools Table Window Help
Normal + Arial, : Arial 18
ACME REGIONAL HEALTHCARE SYSTEMS
INTERNAL MEMO
To: All Shipping and Packaging Staff
Acme Regional Healthcare System, Inc.

The document is checked out and opens in Word

If more than one document matches the search criteria you entered, a window displays all the documents (Word or Excel only) that match the criteria. Click the one that you want to check out.

In this example, we searched for all the documents in the Folder Memos.

If more than one document is found, click to select the one that you want.


Document Search Result List
Date Title Key 1 Key 2 Key 3 Key 4 Key 5 Key 6 Key 7
2007-02-08 12: Shipping Procedures Procedures Wanda Smith Shipping Persor 02-01-2007 NA
2007-03-16 10: Good Job Shipping Department Praising wheelc Wanda Smith Shipping Persor 03/16/07 Willowbrook Hc 32789-0000
Cancel

Select the document you want to check out

5. Make your changes to the document and then check it back in 107.

If you change your mind and decide you do not want the document to be checked out, undo the checkout 108.

Checking Out Open Documents from Word or Excel

To check out a document that you have *already opened* from WebDocs, but that you have not checked out, use the **CheckOut Document** command. This works similarly to the Open/CheckOut command.

To check out an already open document:

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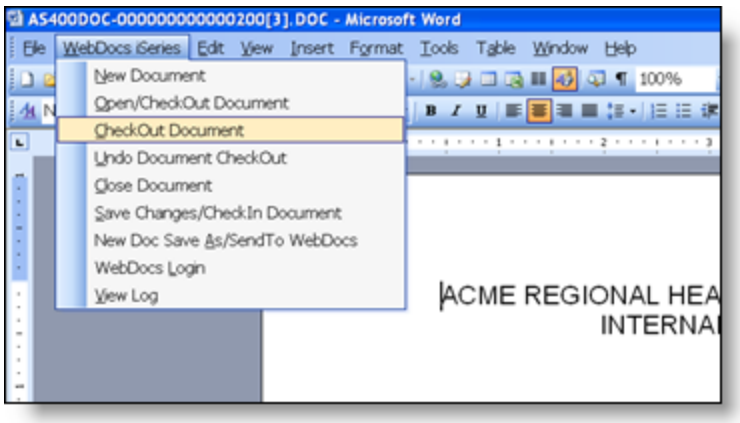
1. If the document you want to check out is not already open, open it from WebDocs.

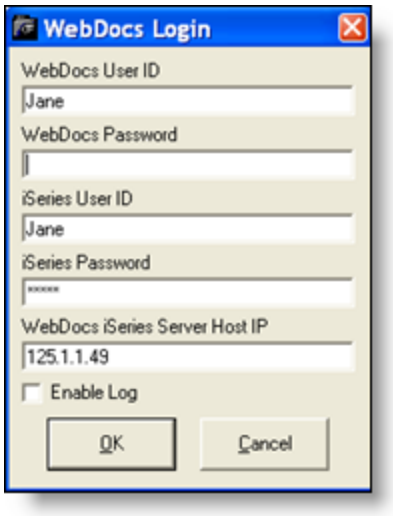
2. Click the **CheckOut Document** command from the WebDocs iSeries menu.

   Note: To check out a document that is *not* already open, refer to Opening and Checking Out Documents from Word or Excel 102.



Click this menu option to check out a document that is already open.

The WebDocs Login window displays.



Enter all Login information

3. Enter your WebDocs User ID and Password, your iSeries User ID and Password, and your WebDocs iSeries Server Host IP. Click the **OK** button.

   Enter your WebDocs and iSeries Passwords every time you log in using this window. This information is not saved.

   Note: If you do not have an iSeries User ID and an iSeries Password, or you do not know your WebDocs iSeries Server Host IP, contact your system administrator.

   The document is checked out of WebDocs. If you go in to WebDocs and look at the Document Details window, you can see that it is already checked out.

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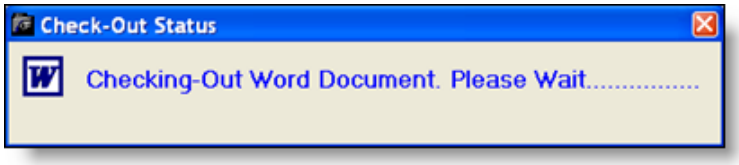
The Check-Out Status message window displays.



4. Make your changes to the document and then check it back in 107.

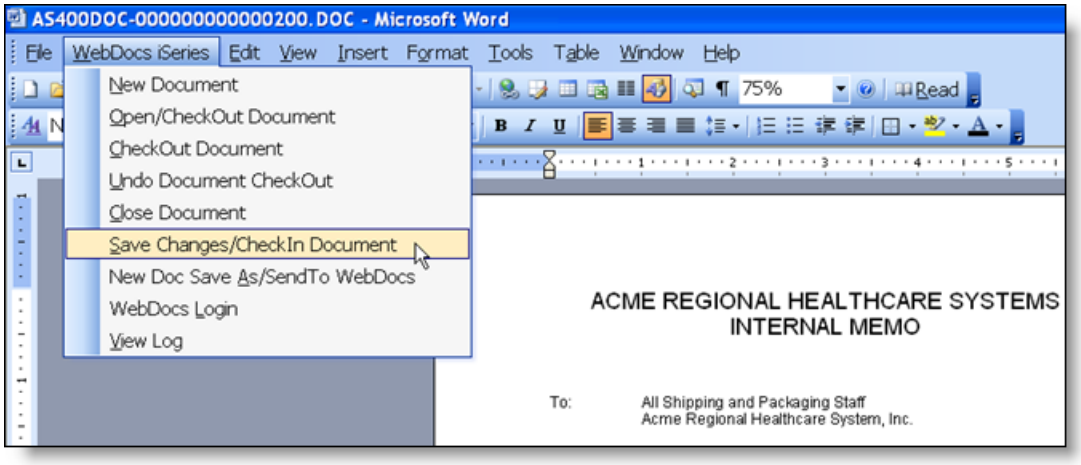
Checking In Documents from Word, Excel, or Outlook

This topic covers checking documents back in to WebDocs from Word or Excel. For information about checking the documents out, refer to Checking Documents Out from Word or Excel 105.

To check in a document that you had previously checked out:

1. If it is not already started, start the Microsoft application in which you want to work. In this example, we will use Microsoft Word. The process is identical for Microsoft Excel.
2. If it is not already opened, open the document that you want to check back in.

   Note: When it was checked out, the document was saved to a temporary directory named webdocstemp on your hard drive.
3. Click the **Save Changes/CheckIn Document** command from the WebDocs iSeries menu.



Click this menu option to check in a document

If you have not saved the document since you last changed it, this message window displays.

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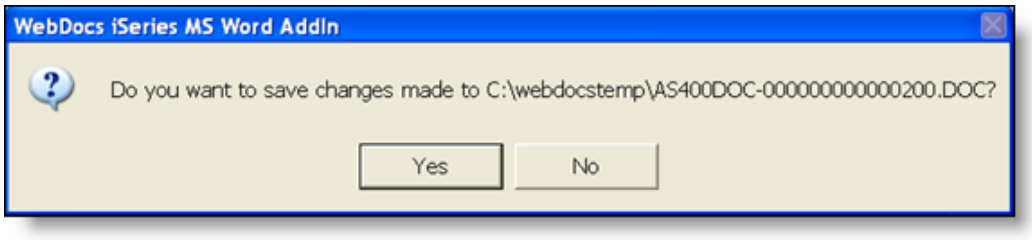
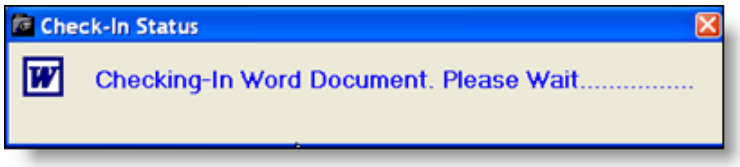
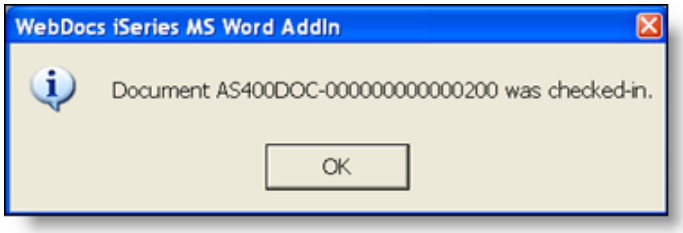


4. Click **Yes** to save your changes and check the document back in.

   The Check-In Status message window displays.



   When the check-in is complete, this message window displays.



5. Click the **OK** button.

   The message window closes. The document is saved, closed, and checked back in to WebDocs.

If you log in to WebDocs, you can see that the document in WebDocs contains your most recent changes.

Undoing Document Checkout from Word or Excel

If you do not want to save changes to a document that you previously checked out of WebDocs within Microsoft Word or Excel, undo the checkout.

To undo document checkout:

1. Click the **Undo Document CheckOut** command from the WebDocs iSeries menu.

   Note: The instructions below assume that you have already opened Microsoft Word or Excel and checked out a document. If you have not checked out a document, there is nothing to undo.

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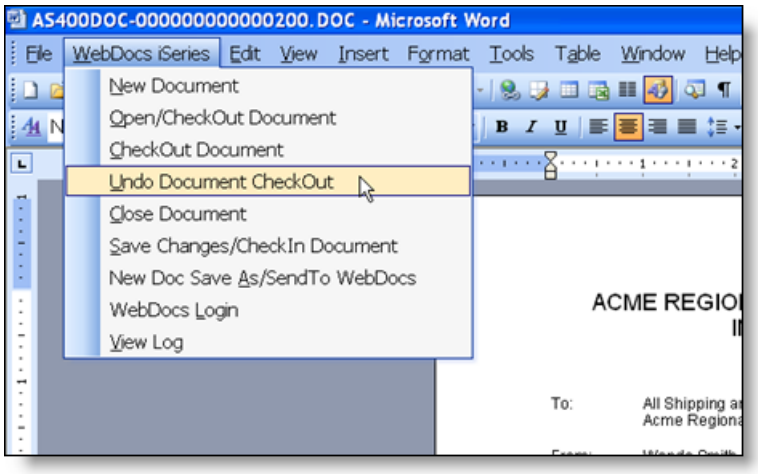
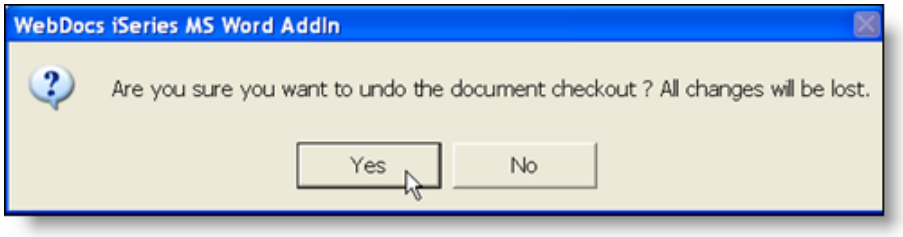


Click this menu option to undo checkout

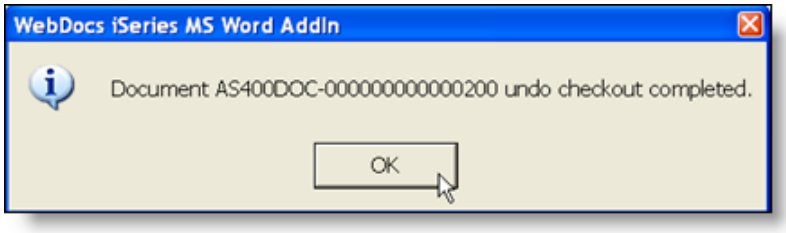
This message window displays:



2. Click **Yes** to undo the checkout and lose any revisions you made to the document.

   Click **No** to "not undo" the checkout and leave the document still checked out for editing.

   If you click Yes, this message window displays.



3. Click the **OK** button.

   The message window closes. The document remains open in Microsoft Word or Excel, but it is no longer checked out of WebDocs.

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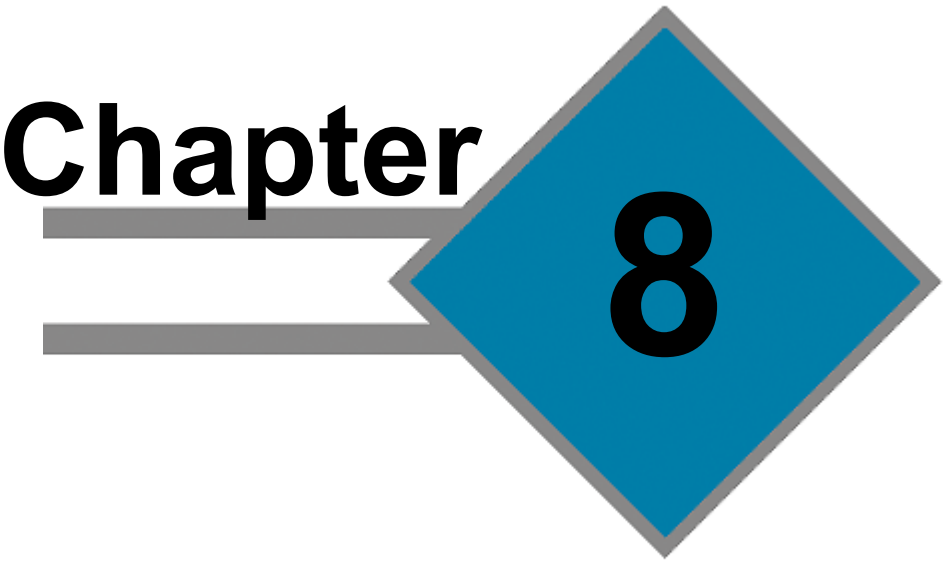


Using Document Routing

Using Document Routing

Document Routing is a WebDocs feature that automates the manual process of taking an envelope (with a document inside) from person to person at your company for approval.

Document Routing must be enabled and configured by your system administrator for you to be able to use this feature. If you do not see "My Inbox" on the left side of the screen, this feature is not enabled for you at your company. For more information, contact your system administrator.

This chapter includes the following topics:

Understanding Document Routing Terminology 112

Approving or Rejecting Documents in an Inbox 116

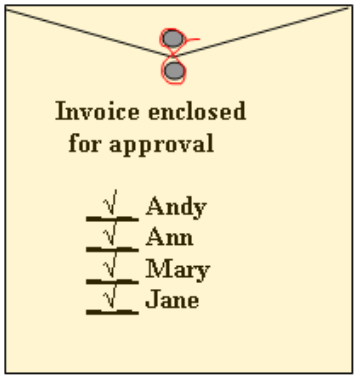
Routing Documents 123

Adding an Inbox to a Routing Slip 129

Viewing Routing Slips for Documents 132

Understanding Document Routing Terminology

Picture an interoffice envelope with a document inside and a list of names on the outside. This envelope will go to each person on the list, in turn. Each person will open the envelope, look at the document, approve it or maybe make some notes on it, and send it to the next person on the list.



An old-fashioned office routing envelope

Document Routing is a WebDocs feature that automates the manual process of walking this envelope (with the invoice inside) from person to person. Documents can either be circulated using a predefined Routing Definition or you can route a document to an Inbox.

There are many ways that companies use Document Routing. Besides just using it to approve documents, you can also use it to create and modify documents. By using Document Routing in conjunction with checking documents out, you essentially have all the functionality of a document control system.

Here are several examples of how WebDocs customers could use Document Routing:

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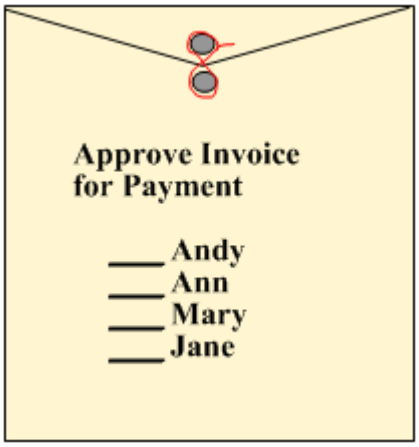
- A manufacturing plant can use Document Routing to automate the creation and printing of all documents associated with outgoing orders.
- A mortgage company can manage the process of making loans from application through approval.
- An accounts payable department can route incoming invoices for approval. The final person in the approval process might be the person who actually cuts the checks.

While Document Routing is a relatively simple concept, to use this WebDocs feature it is important that you understand the terms below.

Routing Definition

A predefined list of Inboxes. For example, if all invoices at your company must go through the same approval process, your system administrator might create a Routing Definition called "Approve Invoice for Payment."



Pictorial representation of a Routing Definition

Route, Route Title, and Route Note

Route - The specific route that one document is on. For example, when one invoice is assigned a Routing Definition, that iteration of the Routing Definition is called a Route.

Route Title - The name of one Route. The Route Title appears on the Routing Slip.

Route Note - Free-form text that accompanies the Route.

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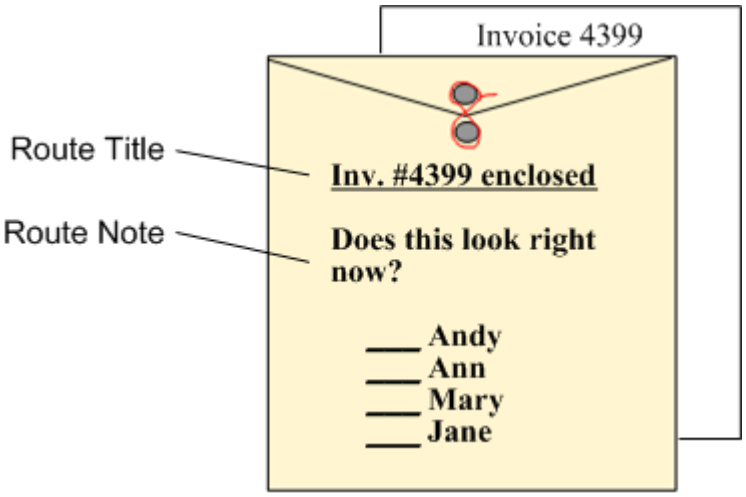


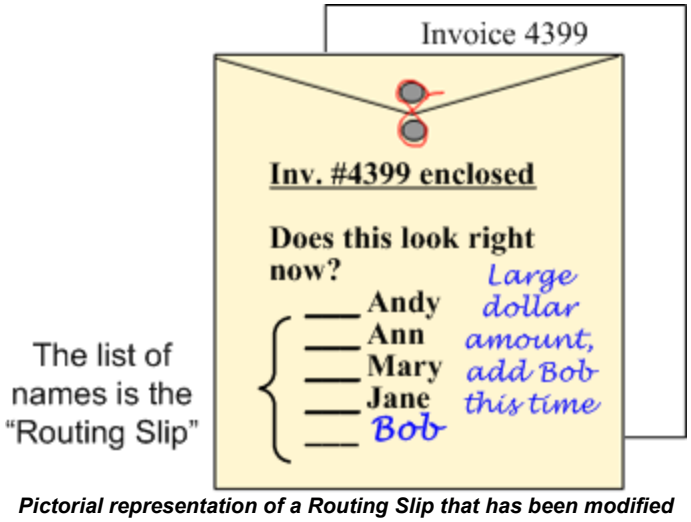
Pictorial representation of a Route

Route List

The list of Routes of which a document is currently a part. Typically a document is only on one Route at a time, but is possible that it may be on more than one.

Routing Slip

The list of Inboxes in a Route. In WebDocs, Routing Definitions generate Routing Slips, but the Routing Slip can be altered for a particular Route. You might do this, for example, if someone is out of town or if a document needs special attention.



Pictorial representation of a Routing Slip that has been modified

Inbox

This is a special mailbox in WebDocs to which documents can be routed. Every user has an

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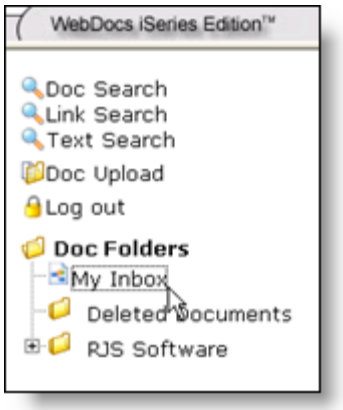
Inbox if Document Routing is enabled in WebDocs. It is labeled "My Inbox." Some users have access to Inboxes other than their own. Some companies use departmental Inboxes so that they can route certain kinds of documents there. Contact your system administrator if you need access to another Inbox.

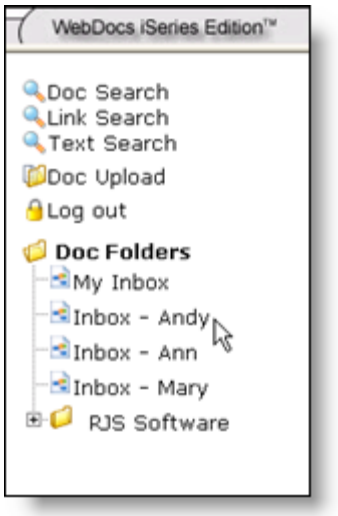
Note: This Inbox is just for documents in Document Routing. Do not confuse this with your email program (i.e., Microsoft Outlook, Outlook Express, Yahoo Mail, etc.) Inbox. If your system administrator has set this up, you may also receive an email in your email Inbox telling you that there is a document in your WebDocs Inbox.

WebDocs users who can only access their own Inboxes see a window that looks like this:



Click to open your Document Routing Inbox

WebDocs users who can access other Inboxes in addition to their own see a window that looks like this:



Click any Document Routing Inbox to open it

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Approving or Rejecting Documents in an Inbox

When it is your turn to work with a document in a Route, that document will appear in your Inbox. Documents remain in your Inbox until you approve or reject them.

If you are not familiar with Document Routing, refer to Using Document Routing 112 and Understanding Document Routing Terminology 112.

Some companies use email to notify you that a new document is in your Inbox. If this is the case, you will receive an email in your email program (i.e., Microsoft Outlook, Outlook Express, Yahoo Mail, etc.) inbox telling you that there is a new document in your WebDocs Inbox.

If your company does not use email to notify you that a document is in your Inbox, your supervisor will probably tell you to check your WebDocs Inbox regularly in conjunction with your other responsibilities.

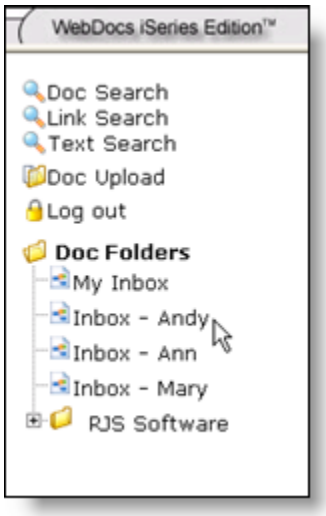
This topic covers first how to approve a document in your Inbox. Refer to the section below for instructions on rejecting a document 120. To add an Inbox that is not part of the original Route, refer to Adding an Inbox to a Routing Slip 129.

Approving Documents in your Inbox

To approve a document in your Inbox:

1. Click **My Inbox** or any other Inbox to which you have access.

   In this example, the user Jane has access to Andy, Ann, and Mary's Inbox. Working an Inbox is the same whether it is your own Inbox ("My Inbox") or any Inbox to which you have access. The steps in this topic from now assume that we are the user Jane looking at Andy's Inbox.



   Andy's Inbox displays. There are three documents in his Inbox. They display in order by when they were placed in the Inbox. Click a column heading to display them in a different order.

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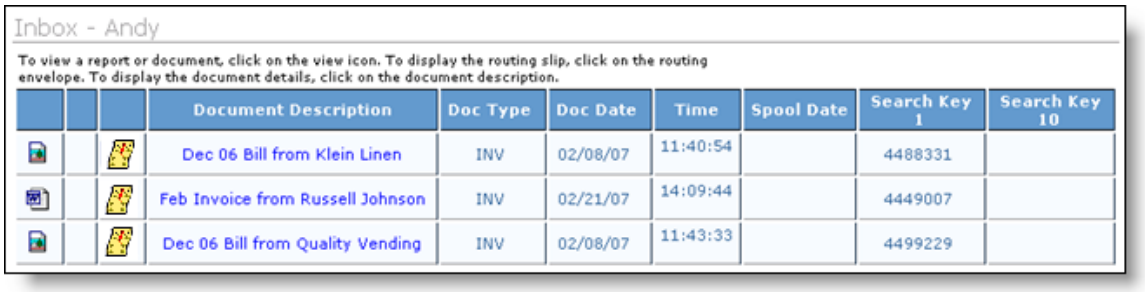
Inbox - Andy

To view a report or document, click on the view icon. To display the routing slip, click on the routing envelope. To display the document details, click on the document description.

			Document Description	Doc Type	Doc Date	Time	Spool Date	Search Key 1	Search Key 10
			Dec 06 Bill from Klein Linen	INV	02/08/07	11:40:54		4488331	
			Feb Invoice from Russell Johnson	INV	02/21/07	14:09:44		4449007	
			Dec 06 Bill from Quality Vending	INV	02/08/07	11:43:33		4499229	

There are three documents in Andy's Inbox

You can now:

- Click a document icon (on the left side of the window) to view the actual document. If your job is to just approve or reject the original document without modifying it, display the document so that you can look at it.
- Click the Document Description to display the "Document Details" window. If your job is to modify the original document, you would want to display the Document Details window so that you could check the document out, revise it, and check it back in 84.

  There is also a set of buttons at the bottom left corner of the "Document Details" window that you can use to quickly approve or reject a document that has been routed to your Inbox.

Inv. #4399 enclosed

- Click the **Routing Slip** icon to display the Routing Slip.

  In this example, we will assume that you already viewed the document, liked what you saw, and will approve it.

2. Click the **Routing Slip** icon for the "Feb Invoice from Russell Johnson" to approve that document.

   The Routing Slip displays. You can see that there are four Inboxes on this Routing slip: Andy (whose Inbox we are viewing), Ann, Mary, and Jane.

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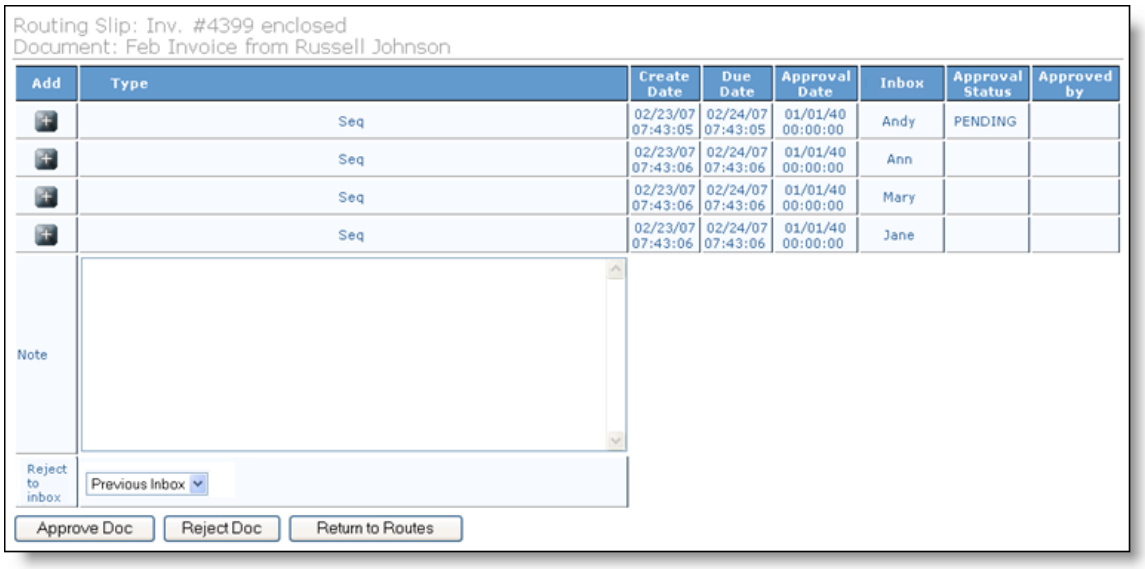


The Routing Slip for the Route "Inv. #4399 enclosed"

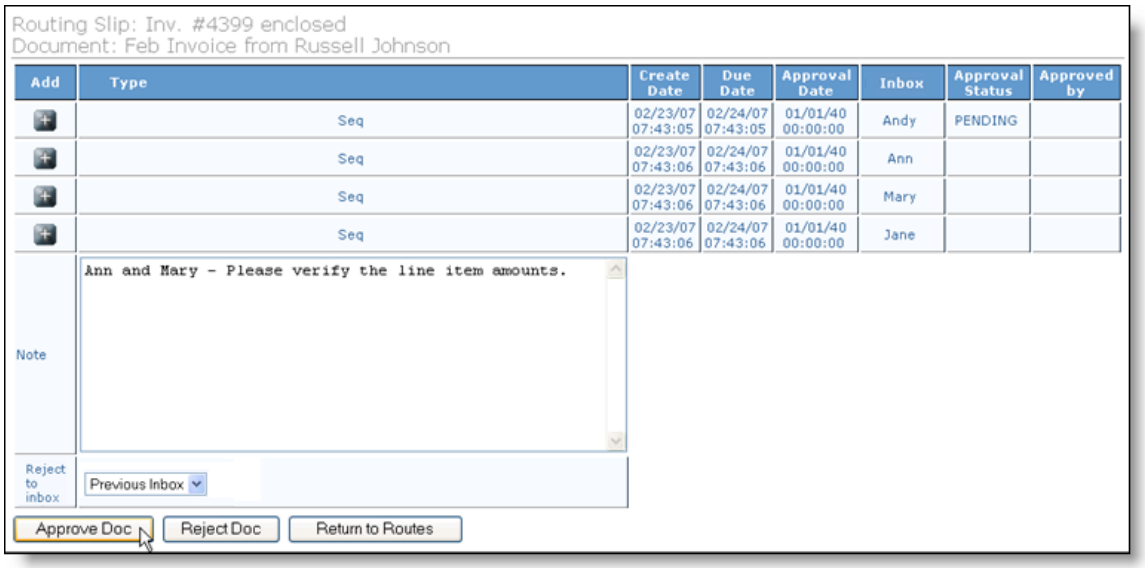
3. (Optional) Enter any explanatory text for future recipients in the Notes box.

   In this example, we entered ***Ann and Mary - Please verify the line item amounts.***

   If you do not enter anything, a Note is created automatically when a document is approved or rejected.

4. Click the **Approve Doc** button.

   Refer to the section below for information about rejecting documents 120.



Approving the document

The document is approved and the Routing Slip displays again. The actual Approval Date and time now display rather than the placeholder "01/01/40 00:00:00."

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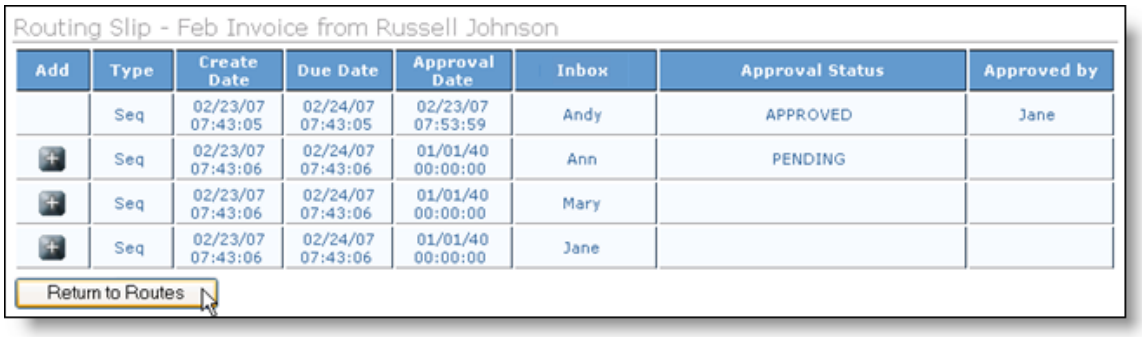
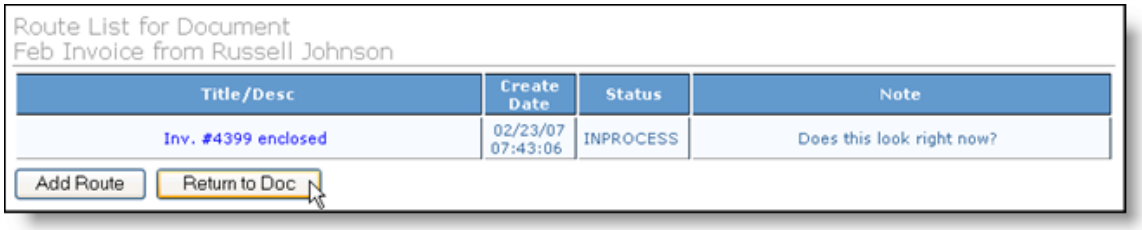

Routing Slip - Feb Invoice from Russell Johnson
Add
Type
Create Date
Due Date
Approval Date
Inbox
Approval Status
Approved by
Seq 02/23/07 07:43:05 02/24/07 07:43:05 02/23/07 07:53:59 Andy APPROVED Jane
Seq 02/23/07 07:43:06 02/24/07 07:43:06 01/01/40 00:00:00 Ann PENDING
Seq 02/23/07 07:43:06 02/24/07 07:43:06 01/01/40 00:00:00 Mary
Seq 02/23/07 07:43:06 02/24/07 07:43:06 01/01/40 00:00:00 Jane
Return to Routes

Jane (on behalf of Andy) has approved the document

5. Click the **Return to Routes** button.

   The Route List for this document displays.



The Route List for the document "Feb Invoice from Russell Johnson"

6. Click **Return to Doc** to display the "Document Details" window.

The document has now been routed to Ann's Inbox.

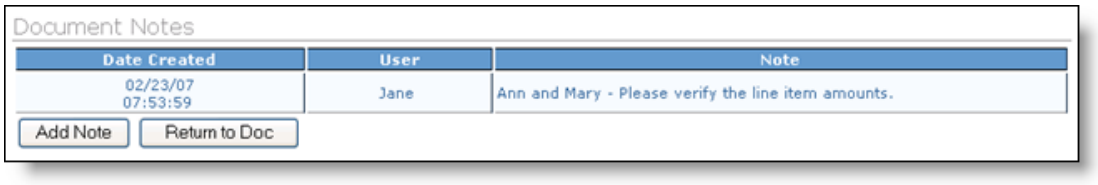
- If Ann logs in and clicks **My Inbox**, this is what she sees:

My Inbox
To view a report or document, click on the view icon. To display the routing slip, click on the routing envelope. To display the document details, click on the document description.
Document Description
Doc Type
Doc Date
Time
Spool Date
Search Key 1
Search Key 10
Feb Invoice from Russell Johnson INV 02/23/07 07:43:02 4449007

The document displays in Ann's Inbox

  The **Notes** icon displays when previous recipients have added Notes to the Routing Slip.

- If Ann clicks the **Notes** icon , this is what displays:



Ann displays the Note entered from Andy's Inbox

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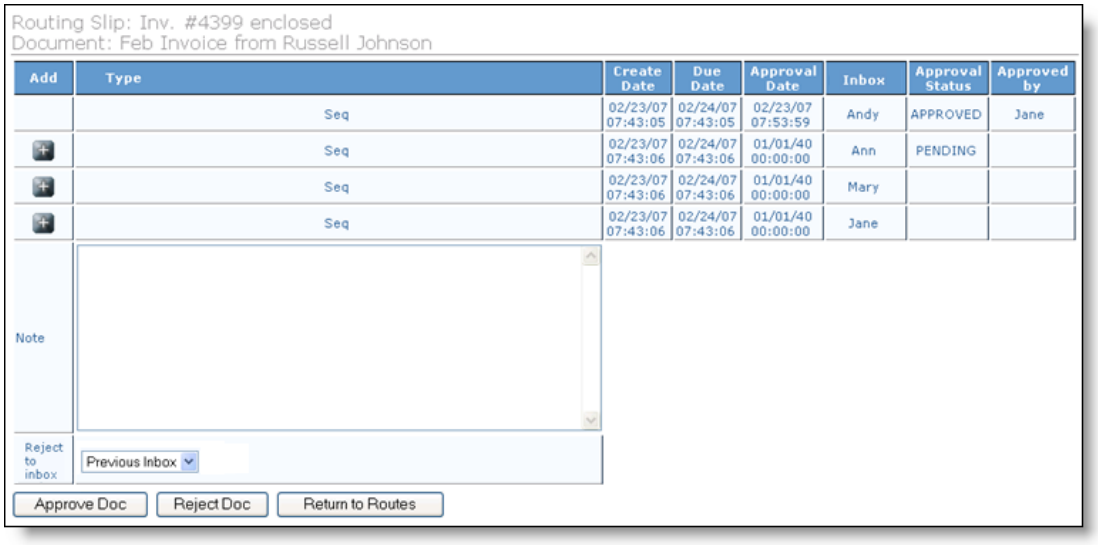
- If Ann clicks the **Routing Slip** icon, the Routing Slip displays:



Ann displays the Routing Slip

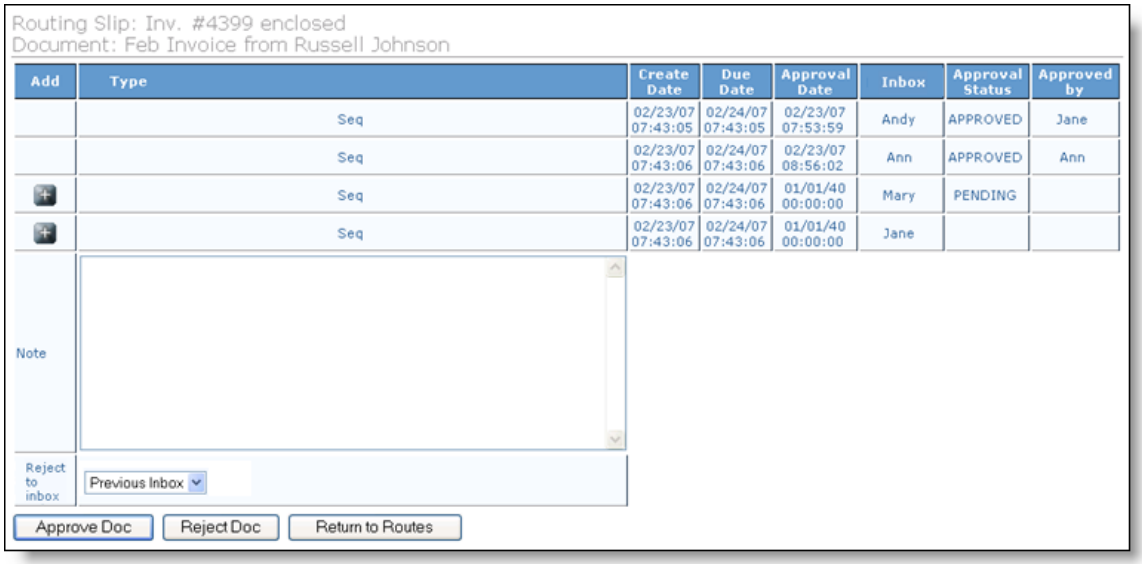
Rejecting Documents

To reject a document instead of approving it:

1. Follow steps 1-3 above for approving a document.

   In this example, we logged in as Mary and are looking at the Routing Slip "Inv #4399 enclosed."

   Assume that Ann approved the document on 02/23/07.



Mary looks at the Routing Slip

2. Click the **Reject to inbox** drop-down list.

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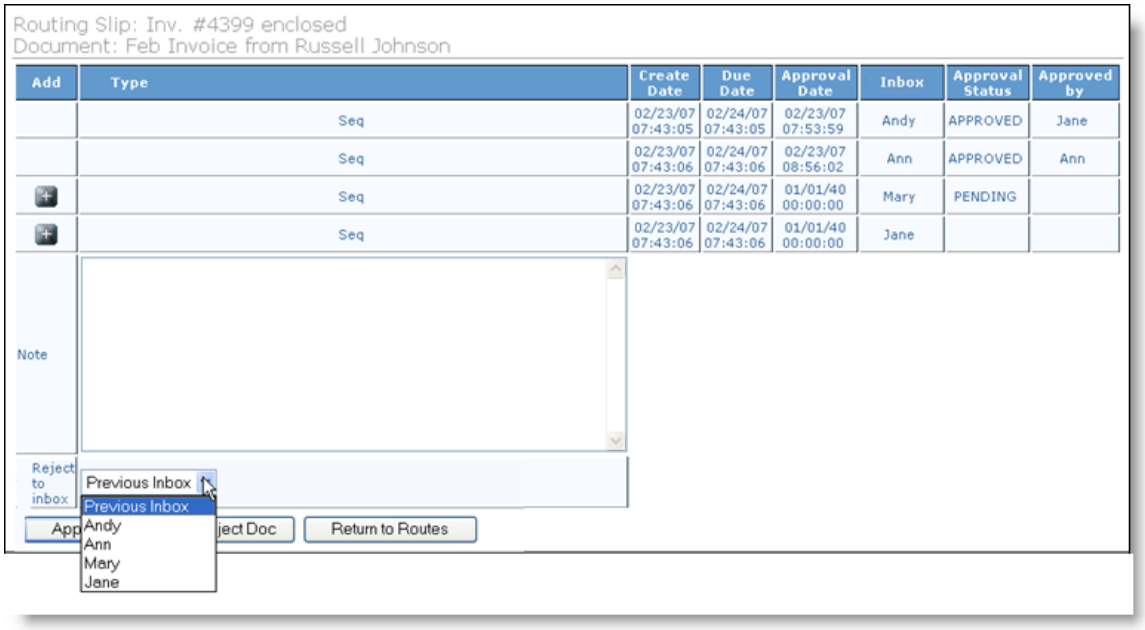
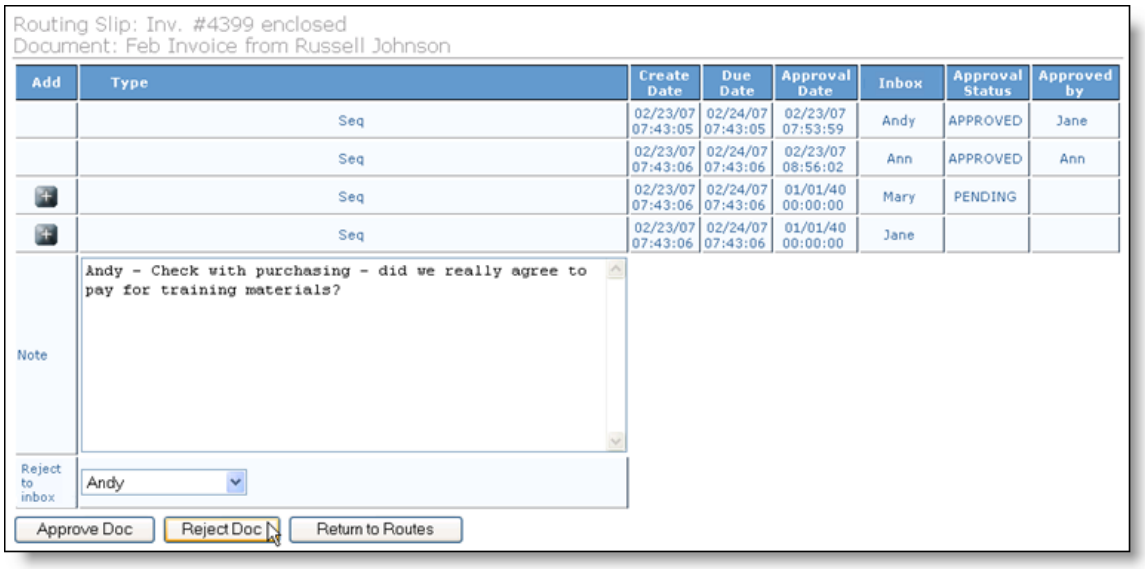
All Inboxes in the Route display in the drop-down list. You can reject the document to any of these Inboxes. If you do not select an Inbox from the drop-down list, it rejects to the previous Inbox.



Select the Inbox to which you want to reject the document

3. Enter a Note and select the Inbox to which to route the rejected document.

   In this example, we will reject the document to Andy.



Document rejected to Andy's Inbox

4. Click the **Reject Doc** button.

   The Routing Slip displays. Any previous activity for this Route is gone.

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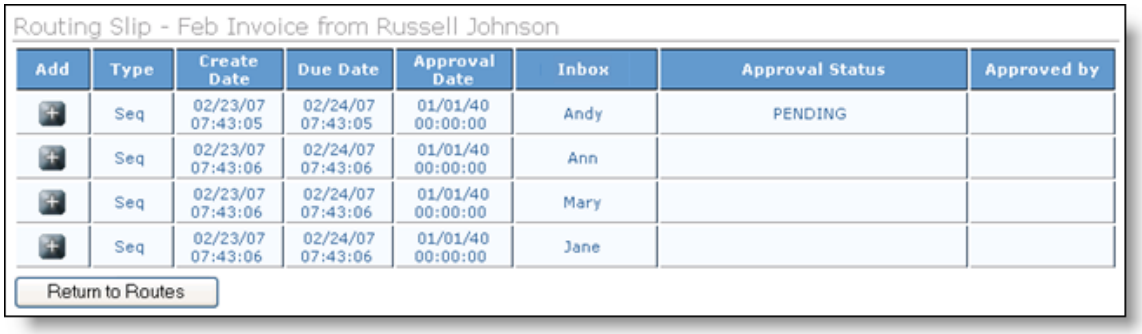


Routing Slip - Feb Invoice from Russell Johnson

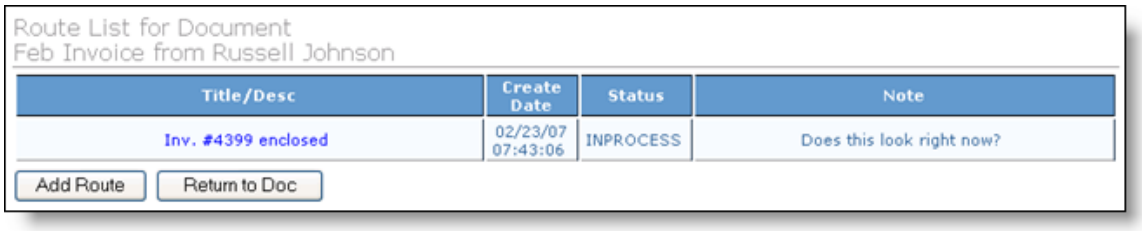
Add	Type	Create Date	Due Date	Approval Date	Inbox	Approval Status	Approved by
	Seq	02/23/07 07:43:05	02/24/07 07:43:05	01/01/40 00:00:00	Andy	PENDING	
	Seq	02/23/07 07:43:06	02/24/07 07:43:06	01/01/40 00:00:00	Ann		
	Seq	02/23/07 07:43:06	02/24/07 07:43:06	01/01/40 00:00:00	Mary		
	Seq	02/23/07 07:43:06	02/24/07 07:43:06	01/01/40 00:00:00	Jane		

Return to Routes

Routing Slip showing the Document pending in Andy's Inbox

5. Click the **Return to Routes** button.

   The Route List displays.



Route List for Document
Feb Invoice from Russell Johnson

Title/Desc	Create Date	Status	Note
Inv. #4399 enclosed	02/23/07 07:43:06	INPROCESS	Does this look right now?

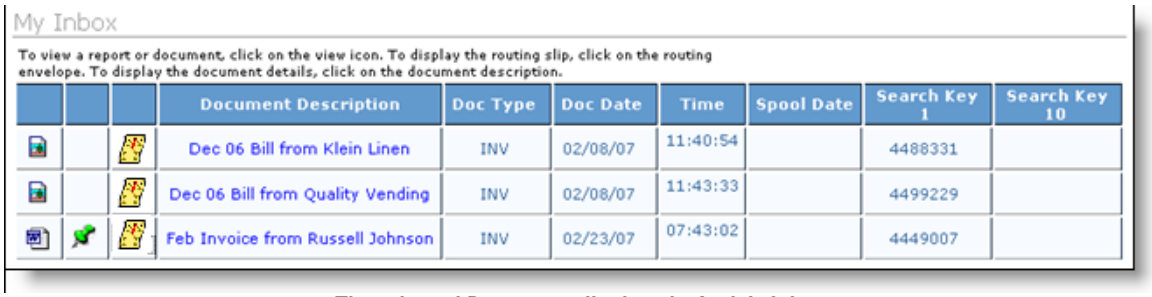
Add Route | Return to Doc

Route List shows this Route

6. Click **Return to Doc** to display Document Details.

The document has been routed to Andy's Inbox.

- If Andy logs in and clicks **My Inbox**, the rejected document is back in his Inbox.



My Inbox

To view a report or document, click on the view icon. To display the routing slip, click on the routing envelope. To display the document details, click on the document description.

			Document Description	Doc Type	Doc Date	Time	Spool Date	Search Key 1	Search Key 10
			Dec 06 Bill from Klein Linen	INV	02/08/07	11:40:54		4488331	
			Dec 06 Bill from Quality Vending	INV	02/08/07	11:43:33		4499229	
			Feb Invoice from Russell Johnson	INV	02/23/07	07:43:02		4449007	

The rejected Document displays in Andy's Inbox

- If Andy clicks the **Notes** icon for the "Feb Invoice from Russell Johnson," this is what displays:

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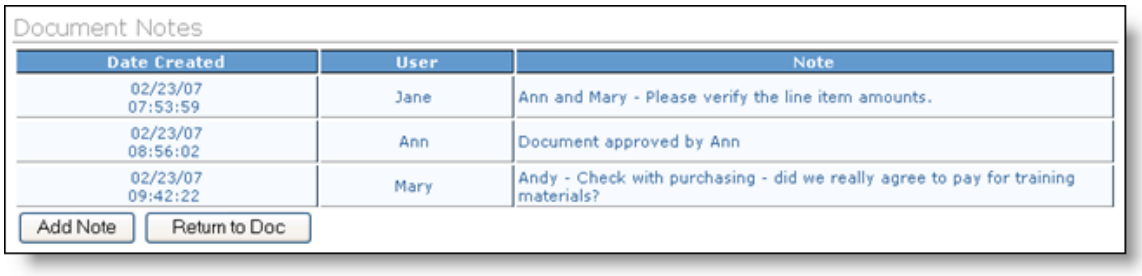
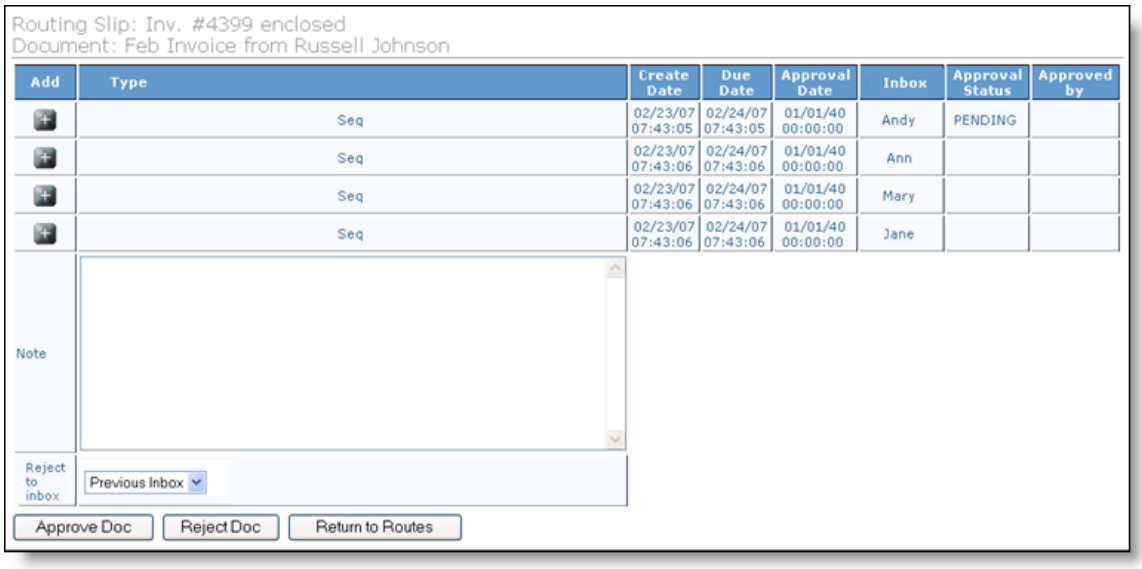


Notes include the Notes from all previous users

- If Andy clicks the **Routing Slip** icon, the Routing Slip displays:



Routing Slip does not show previous routing

Routing Documents

There are two ways that a document can be routed:

- Automatically upon upload. Your system administrator sets this up. If a Routing Definition is automatically assigned upon upload, documents will automatically be routed to the first Inbox in the Routing Definition.

- Manually when you upload or at any time after that by assigning a document to an Inbox or by selecting a Routing Definition.

  This topic covers the two times that you can manually assign a document to a Routing Definition: when uploading the document or after the document is uploaded 125.

If you are not familiar with Document Routing, refer to Understanding Document Routing Terminology 112.

Routing Manually when Uploading

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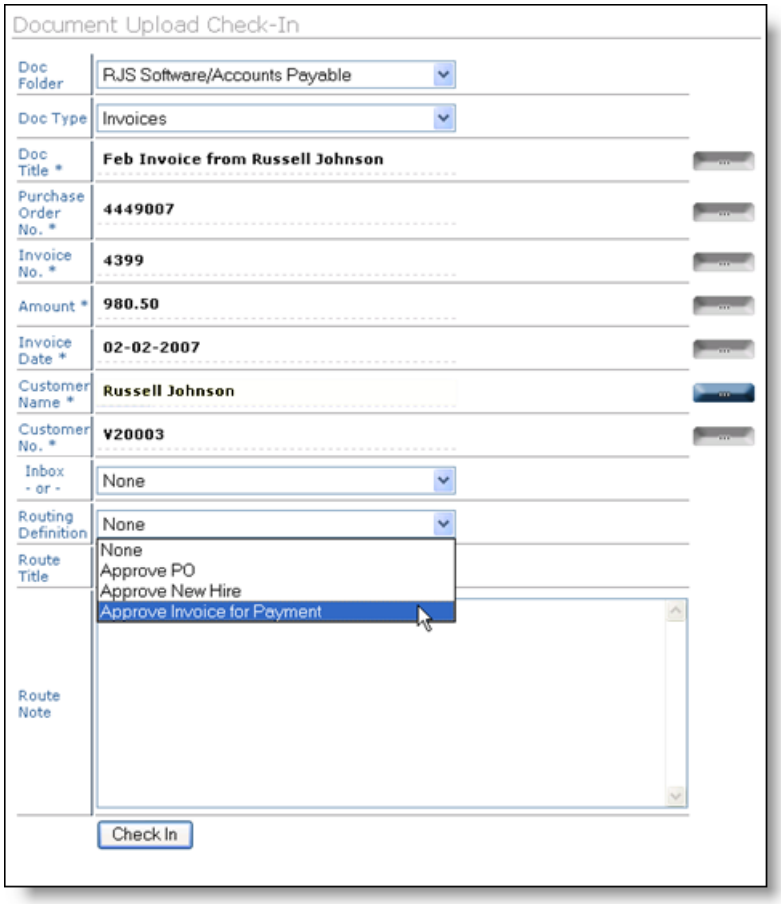
To assign a Route or an individual Inbox when you upload a document:

1. On the "Document Upload Check-In" window, in addition to entering the other upload information, either:

   Select an **Inbox** from the Inbox drop-down list. You can select any *one* Inbox using this method.

   -or-

   Select a **Routing Definition** from the Routing Definition drop-down list. In this example, we will select the Routing Definition "Approve Invoice for Payment."



The Routing Definitions to which you can assign this document

   Note: If you select both a single Inbox and a Routing Definition, the document will be routed to the single Inbox, not to the first Inbox on the Routing Slip.

2. (Optional) Enter a Route Title. This is the title that displays at the top of the Routing List for this document. If you do not enter anything, the Route Title defaults to "Document Route."

   In this example, we entered ***Inv. #4399 enclosed***.

3. (Optional) Enter a Route Note.

   Enter any information that you want the other recipients of this document to see. For example,

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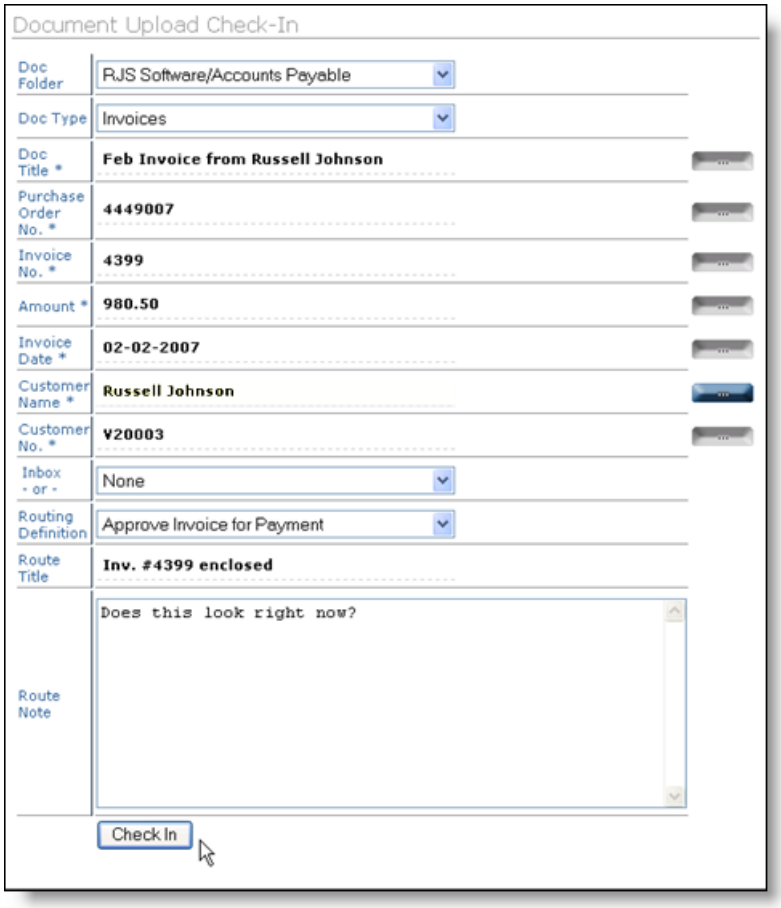
if you have any special considerations, concerns, or instructions, enter them here.

In this example, we entered ***Does this look right now?***



Entering a Route Title and a Route Note

4. Click the **Check In** button.

   The document is uploaded, the Route is created, and the document is sent to the Inbox of the first user on the Routing Slip. If you had selected an Inbox instead of a Routing Definition, the document would be sent to that Inbox.

For more information on processing documents in an Inbox, refer to Approving or Rejecting Documents in an Inbox 116.

For more information on seeing a Route, refer to Viewing Routing Slips for Documents 132.

Routing Manually after Uploading

If the document has already been uploaded:

1. Display the "Document Details" window for the document that you want to route.

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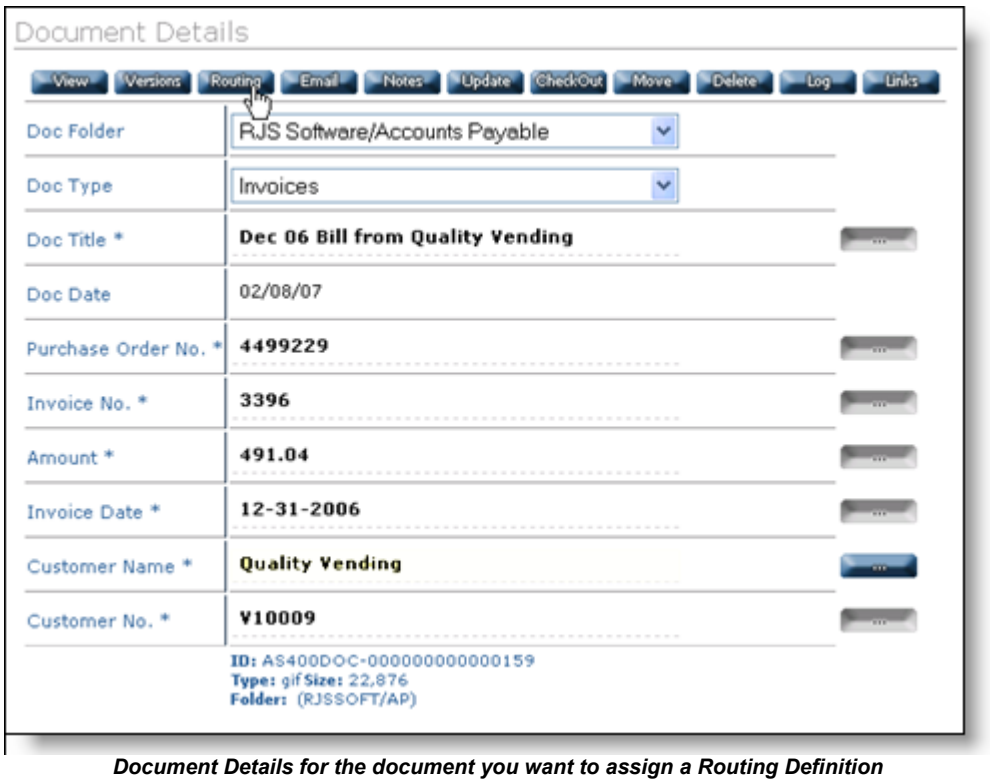
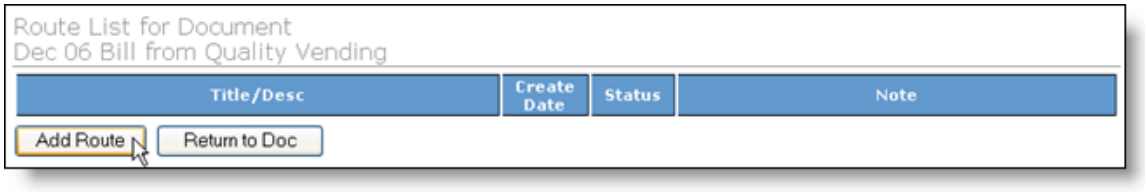
In this example, we will assign an invoice to the Routing Definition "Approve Invoice for Payment."



Document Details for the document you want to assign a Routing Definition

2. Click the **Routing** button.

   In this example, there are no existing Routes for this document. If there were, they would display here.



Any existing Routes for this document display

3. Click the **Add Route** button.

   The "Add Route" window displays.

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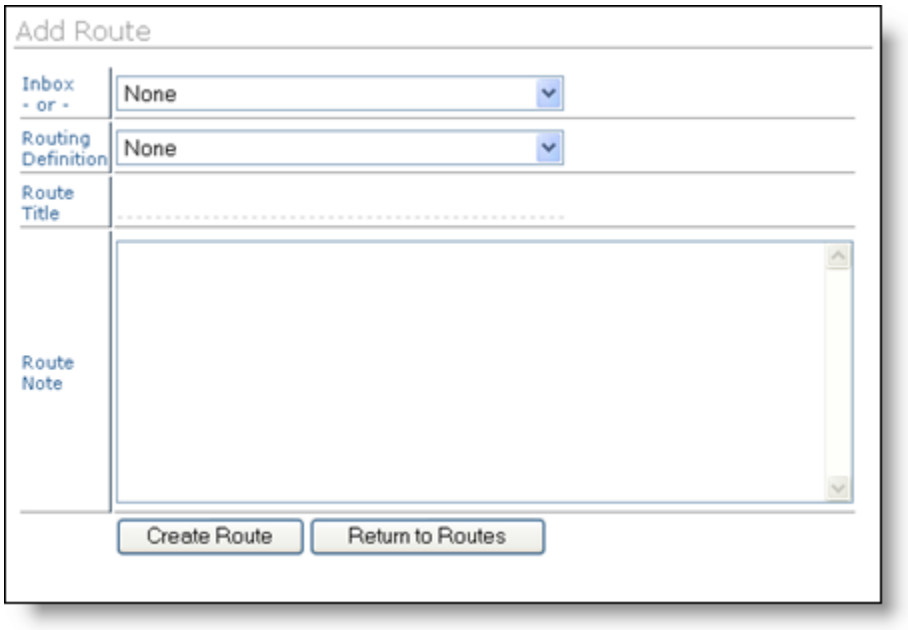

The Add Route screen

Either:

Select an **Inbox** from the Inbox drop-down list. You can select any *one* Inbox using this method.

-or-

Select a **Routing Definition** from the Routing Definition drop-down list. In this example, we will select the Routing Definition "Approve Invoice for Payment."

Note: If you select both a single Inbox and a Routing Definition, the document will be routed to the single Inbox, not to the first Inbox on the Routing Slip.

4. Click the **Routing Definition** drop-down list.

   The list of Routing Definitions display.

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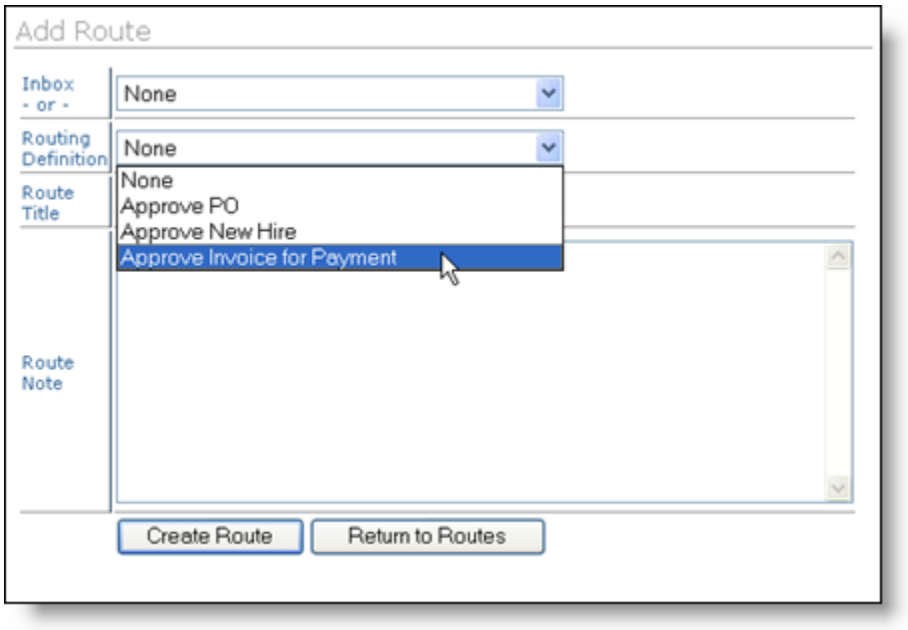

Select the Routing Definition

5. Select the appropriate Routing Definition for this document. If you are not sure which one to select, ask your supervisor or your system administrator.

   In this example, we will select **Approve Invoice for Payment**.

6. (Optional) Enter a Route Title. This is the title that displays at the top of the Routing List for this document. If you do not enter anything, this defaults to "Document Route."

   In this example, we entered ***Approve Dec. 06 bill from Quality Vending***.

7. (Optional) Enter a Route Note.

   Enter information that you want other users in this Route to see. For example, if you have any special considerations, concerns, or instructions, enter them here.

   In this example, we entered ***If you have questions about this, refer...***

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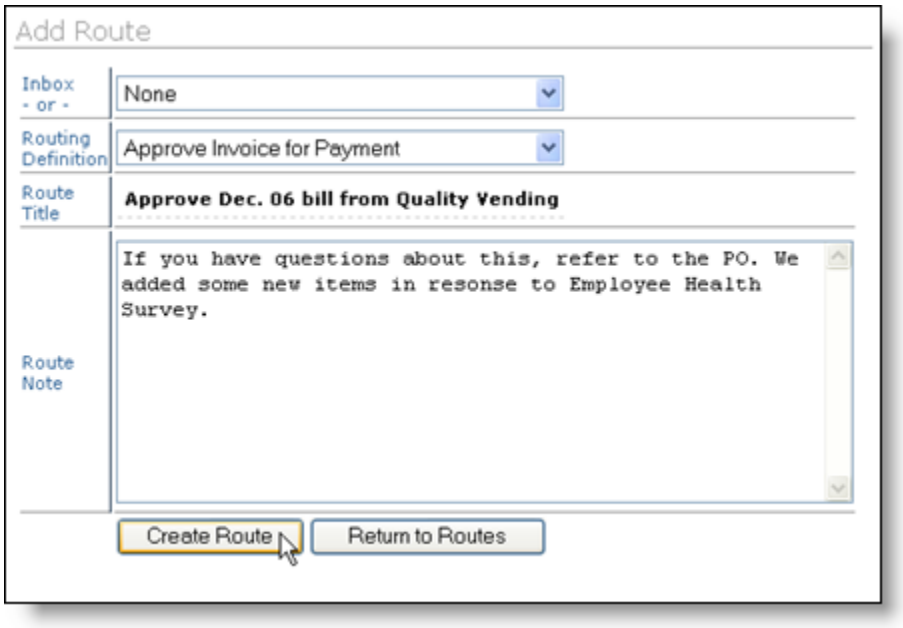
Add Route
Inbox
- or -
None
Routing Definition
Approve Invoice for Payment
Route Title
Approve Dec. 06 bill from Quality Vending
Route Note
If you have questions about this, refer to the PO. We added some new items in resonse to Employee Health Survey.
Create Route
Return to Routes

Entering a Route Title and a Route Note

8. Click the **Create Route** button.

   The Route is created and the document is sent to the Inbox of the first user on the Routing Slip. If you had selected an Inbox instead of a Routing Definition, the document would be sent to that Inbox.

For more information on processing documents in an Inbox, refer to Approving or Rejecting Documents in an Inbox 116.

For more information on seeing a Route, refer to Viewing Routing Slips for Documents 132.

Adding an Inbox to a Routing Slip

Occasionally you may need to add an Inbox to a Routing Slip. This may be appropriate if someone is out of town or if you suspect unusual circumstances and a document needs additional approval. For example, at some companies, if an invoice is over a certain dollar amount, a manager must approve it for payment.

If you are not familiar with Document Routing, refer to Using Document Routing 112 and Understanding Document Routing Terminology 112.

Remember, a Routing Slip is created when a document is routed using a Routed Definition. This topic covers adding an Inbox to the Routing Slip. To route a document directly to an Inbox without using a Routing Definition, refer to Routing Documents 123.

To add an Inbox to a Routing Slip:

1. Click an **Add** button on the Routing Slip.

   Note: Add buttons are in the Add column. They have a plus sign on them. When you add an Inbox, it is added *after* the line for the Inbox you click. To route a document directly to an Inbox

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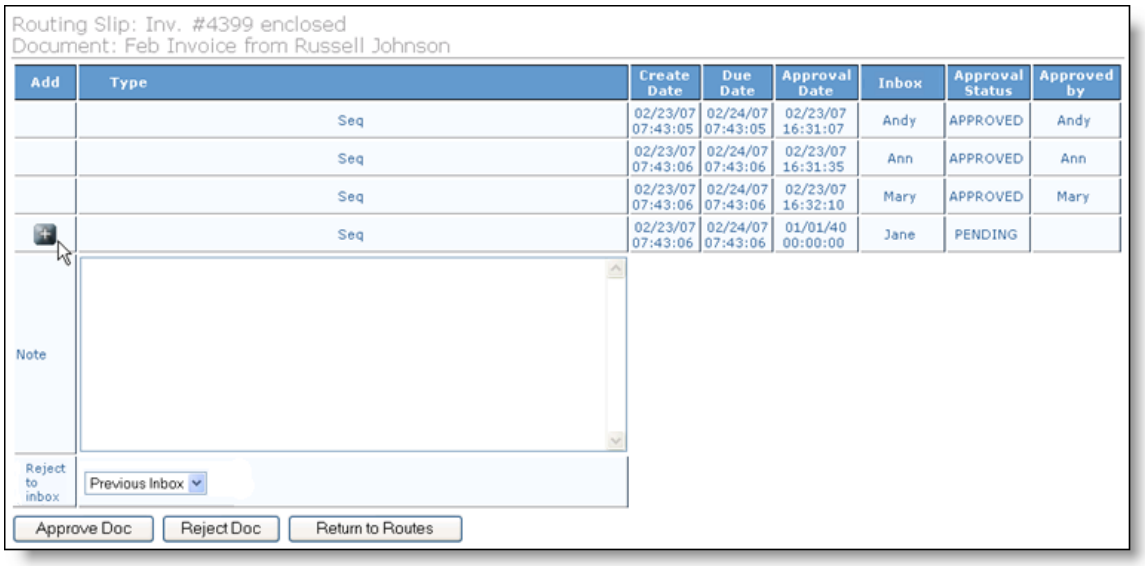
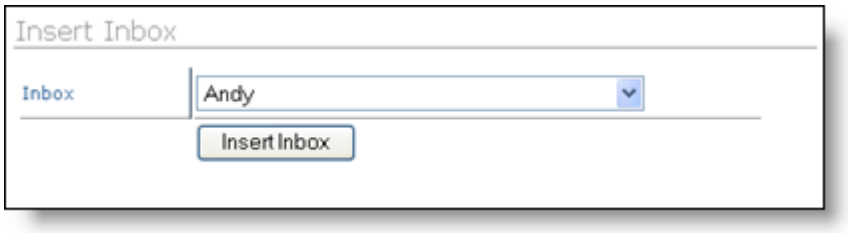
without using a Routing Definition, refer to Routing Documents.

In this example, In this example, the first three recipients have already approved the document. The final recipient (Jane) will add another Inbox to the Routing Slip.



Click the Add button on the Routing Slip

The "Insert Inbox" window displays.



The Insert Inbox window

2. Click the **Inbox** drop-down list and select an Inbox.

   All Inboxes in WebDocs display. In this example, we will select Bob's Inbox.

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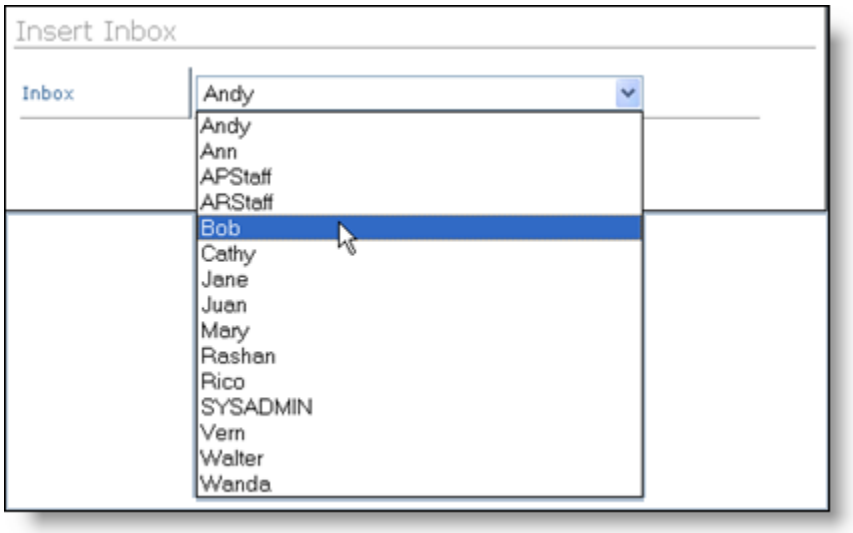
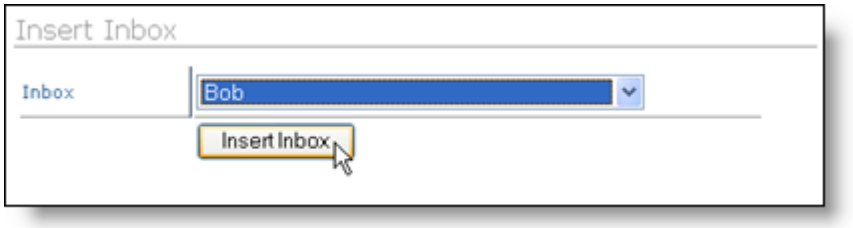


Select an Inbox to insert add to the Routing Slip

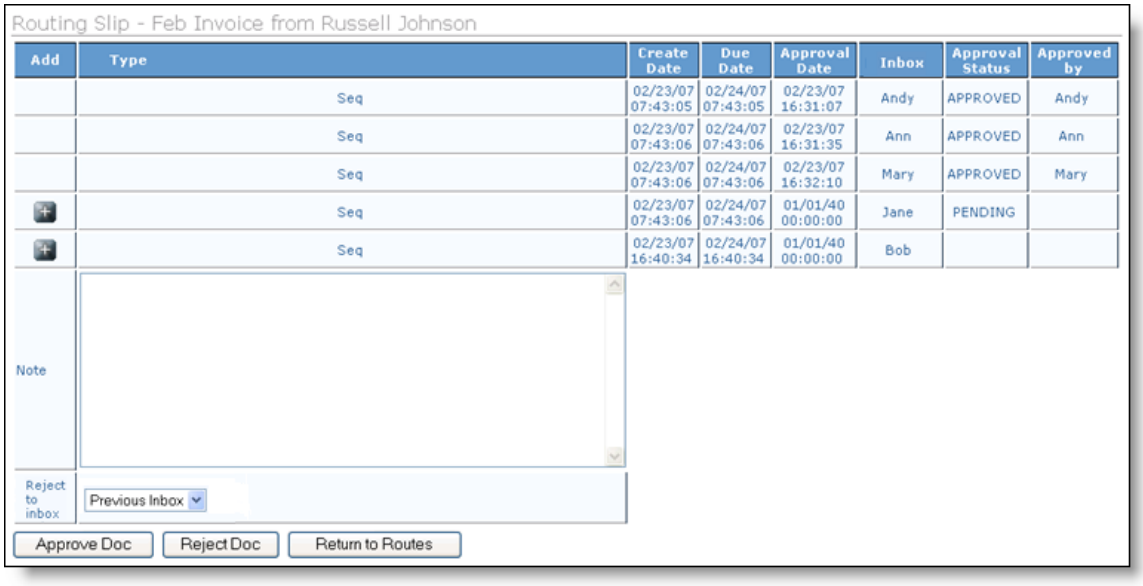
The new Inbox displays.



Bob's Inbox has been selected

3. Click the **Insert Inbox** button.

The Routing Slip displays with the newly added Inbox for Bob.


Routing Slip - Feb Invoice from Russell Johnson
Add
Type
Create Date
Due Date
Approval Date
Inbox
Approval Status
Approved by
Seq 02/23/07 07:43:05 02/24/07 07:43:05 02/23/07 16:31:07 Andy APPROVED Andy
Seq 02/23/07 07:43:06 02/24/07 07:43:06 02/23/07 16:31:35 Ann APPROVED Ann
Seq 02/23/07 07:43:06 02/24/07 07:43:06 02/23/07 16:32:10 Mary APPROVED Mary
Seq 02/23/07 07:43:06 02/24/07 07:43:06 01/01/40 00:00:00 Jane PENDING
Seq 02/23/07 16:40:34 02/24/07 16:40:34 01/01/40 00:00:00 Bob
Note
Reject to inbox
Previous Inbox
Approve Doc
Reject Doc
Return to Routes

Bob's Inbox is added to the Routing Slip

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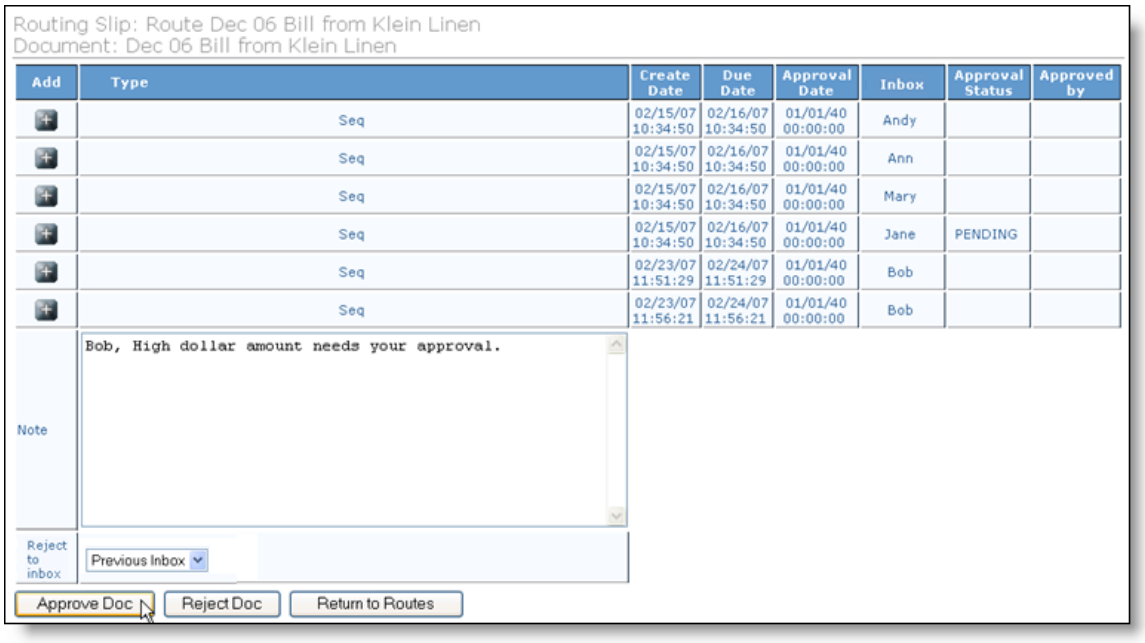
4. (Optional) Enter text in the Note box.

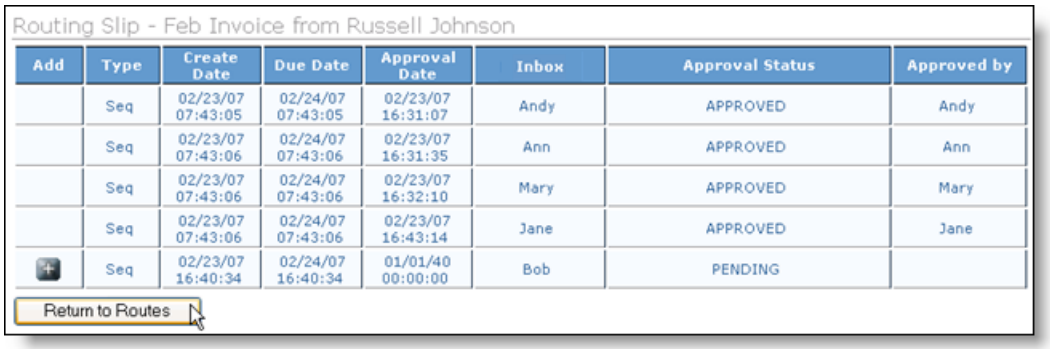
   Typically, you would include why you are routing this document to the additional Inbox. In this example we entered ***Bob, High dollar amount needs your approval***.


Routing Slip: Route Dec 06 Bill from Klein Linen
Document: Dec 06 Bill from Klein Linen
Add
Type
Create Date
Due Date
Approval Date
Inbox
Approval Status
Approved by
Seq 02/15/07 10:34:50 02/16/07 10:34:50 01/01/40 00:00:00 Andy
Seq 02/15/07 10:34:50 02/16/07 10:34:50 01/01/40 00:00:00 Ann
Seq 02/15/07 10:34:50 02/16/07 10:34:50 01/01/40 00:00:00 Mary
Seq 02/15/07 10:34:50 02/16/07 10:34:50 01/01/40 00:00:00 Jane PENDING
Seq 02/23/07 11:51:29 02/24/07 11:51:29 01/01/40 00:00:00 Bob
Seq 02/23/07 11:56:21 02/24/07 11:56:21 01/01/40 00:00:00 Bob
Note
Bob, High dollar amount needs your approval.
Reject to inbox
Previous Inbox
Approve Doc
Reject Doc
Return to Routes

Enter a Note for Bob

5. Click the **Approve Doc** button.

   The Routing Slip displays showing the new Inbox. In this example, Bob's Inbox has been added.


Routing Slip - Feb Invoice from Russell Johnson
Add
Type
Create Date
Due Date
Approval Date
Inbox
Approval Status
Approved by
Seq 02/23/07 07:43:05 02/24/07 07:43:05 02/23/07 16:31:07 Andy APPROVED Andy
Seq 02/23/07 07:43:06 02/24/07 07:43:06 02/23/07 16:31:35 Ann APPROVED Ann
Seq 02/23/07 07:43:06 02/24/07 07:43:06 02/23/07 16:32:10 Mary APPROVED Mary
Seq 02/23/07 07:43:06 02/24/07 07:43:06 02/23/07 16:43:14 Jane APPROVED Jane
Seq 02/23/07 16:40:34 02/24/07 16:40:34 01/01/40 00:00:00 Bob PENDING
Return to Routes

The Routing Slip displays showing this document now Pending in Bob's Inbox.

6. Click the **Return to Routes** button to display the Route List again.

Viewing Routing Slips for Documents

You can view the Routing Slip for a document at any time, even if your Inbox is not on the Route. This might be useful if you need to research where a document is in an approval process or if you

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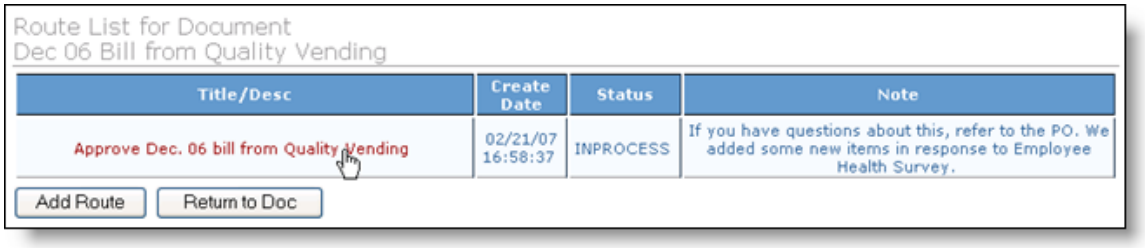
need to see if there are any changes to the Routing Definition.

To view a Routing Slip:

1. From the "Document Details" window, click the **Routing** button.

Click Routing button to see Route List

The "Route List for Document" window displays. If a Route exists for this document, it displays in this window.


Route List for Document
Dec 06 Bill from Quality Vending
Title/Desc
Create Date
Status
Note
Approve Dec. 06 bill from Quality Vending
02/21/07 16:58:37
INPROCESS
If you have questions about this, refer to the PO. We added some new items in response to Employee Health Survey.
Add Route
Return to Doc

Note: If no Route exists for this document, an empty Route List displays.

2. Click the Route.

In this example, we clicked the Route **Approve Dec. 06 Bill from Quality Vending**.

If the document is currently routed to any Inbox besides your own, the Routing Slip displays. In this example, the document is currently in Ann's Inbox. This is what displays if anyone besides

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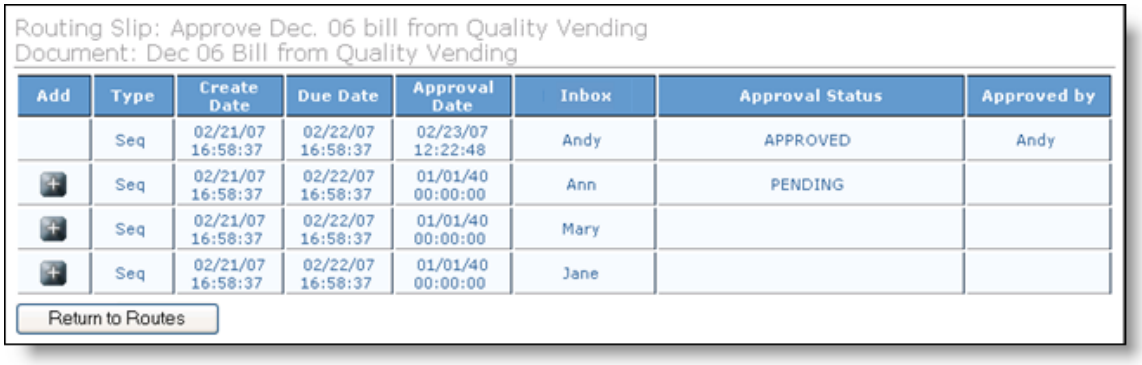
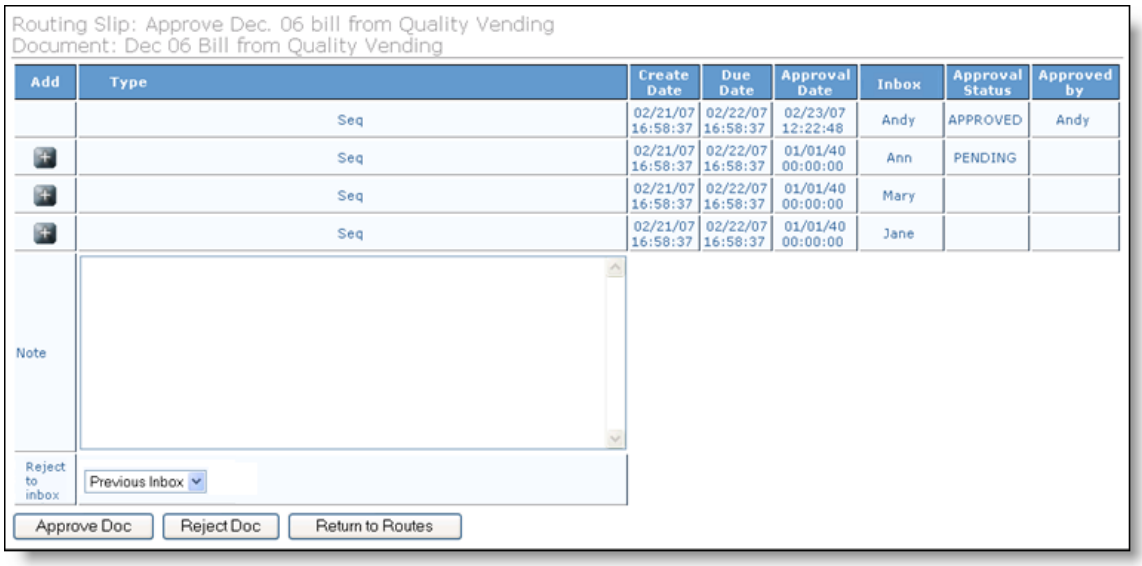
Ann clicks the Route:



The Routing Slip if the Document is not in your Inbox

If the Document is currently routed to your own Inbox, the Routing Slip displays. This is what displays if Ann clicks the Route:



The Routing Slip if the Document is in your Inbox

To insert an Inbox, refer to Adding an Inbox to a Routing Slip 129.

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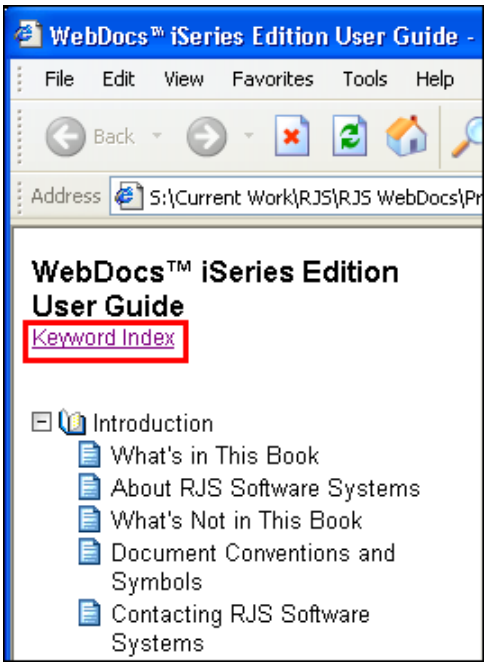
Chapter 9

Index

Index

PDF version - Index is on the next page.

HTML version - Access the Index by clicking the Keyword Index link. It looks like this:



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